INTEGRATING RESOURCES CATALOGING WORKSHOP

TRAINEE MANUAL

Prepared by

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(1) Instructor manual – (2) Trainee Manual
ISBN (Instructor Manual) 0-8444-1133-7
ISBN (Trainee Manual) 0-8444-1134-5

Foreword

The Integrating Resources Cataloging Workshop is the fifth SCCTP workshop to be produced in five years! It was developed to complement the serials-based SCCTP workshops by covering the other half of continuing resources—loose-leafs and updating electronic resources, such as databases and Web sites. New rules for these resources have now been incorporated into Chapter 12 of AACR2 and there is a growing demand for training. Steve Miller has distinguished himself as an expert in the field of electronic resources cataloging, and with help from Rhonda Lawrence and others who catalog loose-leafs, has produced a truly excellent workshop.

Many people made this course possible. We want to thank Manuel Urrizola and the Southern California Library Association for sponsoring the test session for the first draft of the materials. Special thanks go to Valerie Bross and Rhonda Lawrence for teaching the test session and providing excellent feedback and corrections. Once the course materials were in final draft, two train-the-trainer sessions were held. PALINET sponsored the first session in Philadelphia, taught by Steve Miller. The University of Washington hosted the second session, taught by Adam Schiff. Many thanks to Ann Yurcaba and Steve Shadle for all of their efforts and to Steve and Adam for teaching the sessions.

The course material has gone through many rounds of corrections by a stalwart group of revisers, that consisted of Adam Schiff, Judy Kuhagen, Dave Reser, and Louise Rees. Without their knowledge and careful eyes, the material would be far less exact.

This course is designed to be taught by trained SCCTP trainers. As with all SCCTP course materials, they may also be used for self-study or informal in-house training. Comments on the materials are always welcome.

To learn more about SCCTP, visit the Web site at:
http://www.loc.gov/acq/conser/scctp.home.

Ana Cristan, BIBCO Coordinator
Jean Hirons, CONSER Coordinator
Library of Congress

April 2003

Preface to the June 2007 Revision

The *Integrating Resources Cataloging Workshop* was revised in June 2007 to update coding changes involving the use of the continuing resources format and bibliographic level "i" in OCLC. Since OCLC implemented code i in June 2006, catalogers on that utility have been using the continuing resources format and bibliographic level "i" for creating records for integrating resources which consist primarily of language material (as opposed to computer content, cartographic content, etc. for which a different format would be appropriate). This subsumes the "interim" PCC practice for language material where the monographic format and other coding were used for these materials. The revision also reflects the merger of RLG and OCLC by removing references to practices in RLG.

The Program for Cooperative Cataloging extends its thanks and acknowledgement to those responsible for the 2007 revision:

Lisa Furubotten Texas A&M University
Adam Schiff University of Washington
Steven J. Miller University of Wisconsin-Milwaukee
Jennifer Lang Princeton University Library

Thanks to all!

Les Hawkins
CONSER Coordinator
Library of Congress

Session 1 Introduction to Integrating Resources

Session 1

Introduction to Integrating Resources

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Goals for the Integrating Resources Cataloging Workshop

1. Understand the new concept of integrating resources
2. Be able to identify integrating resources and distinguish them from serials and monographs
3. Be able to apply the new AACR2 rules for original description of integrating resources
4. Be able to code MARC records for integrating resources
5. Be able to update the description of existing records for changes to integrating resources
6. Be able to identify and edit existing records for copy cataloging of integrating resources

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Outline of the workshop

- Session 1: Introduction to IRs and other new concepts
- Session 2: Original cataloging of IRs
  - Apply new AACR2 rules, LCRIs, and MARC coding
  - Focus on electronic IRs; some coverage of loose-leafs
- Session 3: Updating records for changes in IRs
  - Apply "integrating entry" cataloging convention
- Session 4: Copy cataloging of IRs
  - Issues in identifying, modifying, and maintaining existing records for IRs

Optional Sessions:

- Session 5: Case studies in cataloging electronic IRs
- Session 6: Issues in cataloging loose-leaf IRs
- Session 7: Selecting electronic IRs and options for access

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Goals of Session 1

1. Review the background that led to the 2002 revisions of AACR2 and the new category of "integrating resources"

2. Understand what an integrating resource is and how it relates to monographs and serials

3. Know when to catalog a resource as a monograph, as a serial, or as an integrating resource

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Background (1)

- Major effort to revise international standards (AACR, ISSN, ISBD) beginning in 1997
  - Emergence of new types of electronic resources for which there were no rules
  - Dissatisfaction with the current codes for serials and loose-leafs
  - Desire to harmonize internationally to promote record usage

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Background (2)

- Graham/Hirons *Issues Related to Seriality* paper
  - Given at International Conference on the Principles and Future Development of AACR in Toronto, 1997
- Effort to revise AACR2 from 1998-2001
  - JSC charge to Jean Hirons
  - ALA, CC:DA, LC, CPSO, CONSER, and others involved in the process
- Resulted in a complete revision of AACR2 Chapter 12 and other changes in 2002
  - Incorporates most rules from Hallam's manual for loose-leafs
- MARC changes have been agreed upon, and most implemented
- LCRIs have been revised
- BIBCO/CONSER documentation is available online

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Implementation

- LC implemented new AACR2 rules and LCRIs on Dec. 1, 2002

- OCLC and RLG implemented most new 006/008 codes on Dec. 1, 2002

- New Leader Bibliographic level code "i" (integrating)

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Former Bibliographic Landscape

Monographs   Serials
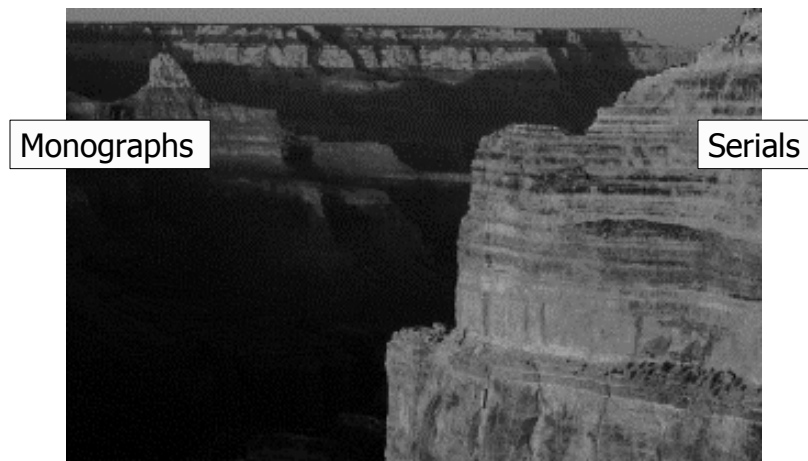
The need for new concepts

- There are new (and old) forms of publication that have not been included in AACR2: updating Web sites, updating databases, and updating loose-leafs

- These are now called *Integrating Resources*

- Integrating resources differ from serials in the manner in which they are issued and require separate cataloging rules

- However, because they exhibit a high degree of *seriality*, they have much in common with serials and need to be closely aligned with them

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The New Bibliographic Landscape

Continuing Resources

Integrating resources

Monographs
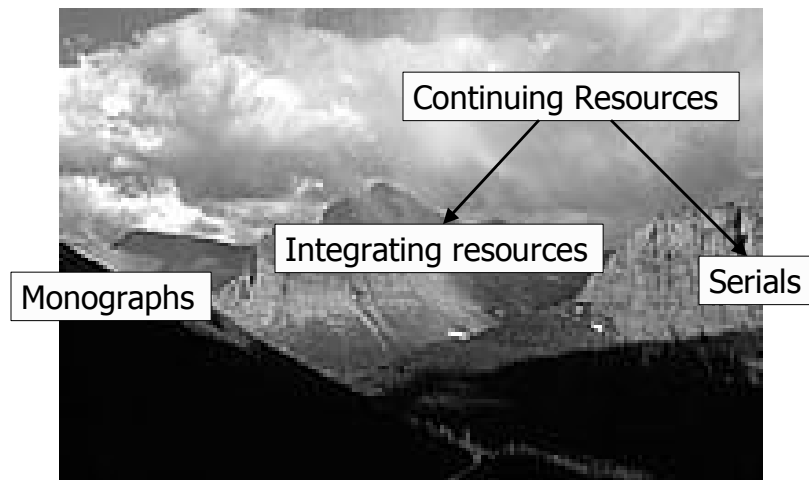
Serials

The need for new concepts (cont.)

- **Continuing Resources** is a concept that serves as a collective term for both serials and integrating resources
    - It refers to resources that have no predetermined conclusion
    - It is the title of Chapter 12
    - It is the new name for the Serials fixed field in MARC records which will be used for both serials and integrating resources
    - It is the scope of ISSN

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Representation of bibliographic resources in AACR2

Finite resources
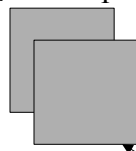
Continuing resources

Monographs

Serials

Integrating resources

Multi-parts

Parts remain discrete
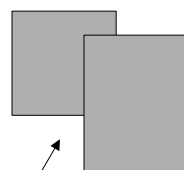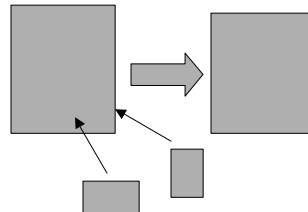
Updates do not remain discrete

Monograph

- Definition

  A bibliographic resource that is **complete in one part** or intended to be completed in a **finite number of parts.**

- Multipart Item

  A monograph complete, or intended to be completed, in **a finite number of separate parts**. The separate parts may or may not be numbered.

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Continuing resource

- Definition

  A bibliographic resource that has **no predetermined conclusion.**

  This is an umbrella concept that is used to group serials and integrating resources. It provides a collective term for serials and integrating resources.

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Serial

- Definition

> A continuing resource that is **issued in a succession of discrete parts**, **usually** bearing numbering, that has **no predetermined conclusion.**

Examples include: journals, electronic journals, newsletters, annual reports, newspapers, monographic series

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Integrating resource

- Definition

> A bibliographic resource that is added to or changed by means of **updates that do not remain discrete and are integrated into the whole**. An integrating resource may be finite or continuing.

Includes: updating Web sites, updating databases, updating loose-leafs

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Iteration

- Definition

An instance of an integrating resource, either as first published or after it has been updated.

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Differences: integrating resources and serials

- The primary difference between an integrating resource and a serial is the **manner in which it is issued**

  - Serials are issued in **discrete parts**

  - Integrating resources are issued with **updates that do not remain discrete**

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Differences in cataloging

- Basis of the description:
  - Serials: First or earliest available issue
  - IR: Latest iteration

- Change conventions:
  - Serials: Successive entry (a new record each time there is a major change)
  - IR: Integrating entry (the same record is used and updated for most changes)

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Three major types of IRs

- Updating Loose-leaf
  - Examples: AACR2, CONSER Editing Guide, LCRIs, many law reporters and legal loose-leaf services

- Updating Database
  - Examples: OCLC WorldCat, ProQuest, Books in Print online, Epicurious

- Updating Web Site
  - Examples: LC Web site, CONSER Web site, University of Washington Web site

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Updating Loose-leaf

LIBRARY OF CONGRESS | RULE INTERPRETATIONS

Cataloging Distribution Service, Library of Congress   Washington, D.C. 1990

Updating Database

Updating Web Site

Integrating resources may be continuing or finite

- While all integrating resources are intended to be updated, some are finite in scope
  - E.g., ALA 2001 Midwinter Meeting Web site --has a predetermined conclusion

- Both are included in Chapter 12 because:
  - There is no difference in the way they would be cataloged
  - It might be difficult to make this distinction
  - The distinctions are not useful to patrons

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Finite Updating Web Site
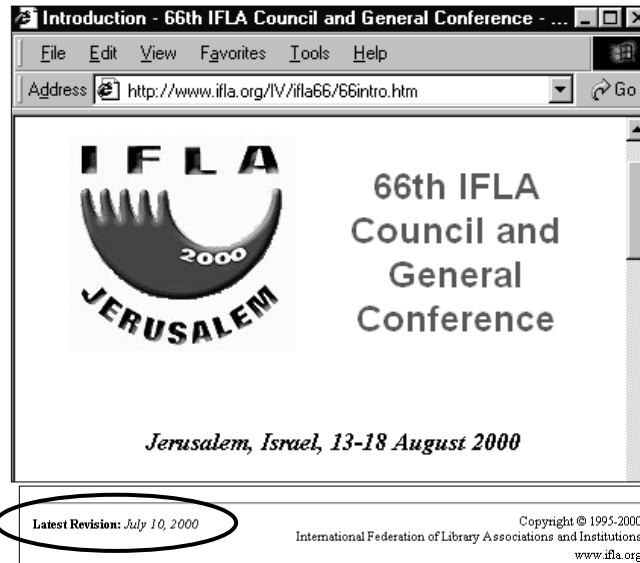
Online and **loose-leaf** format resources may be monographic, serial, or integrating

Online monographic document
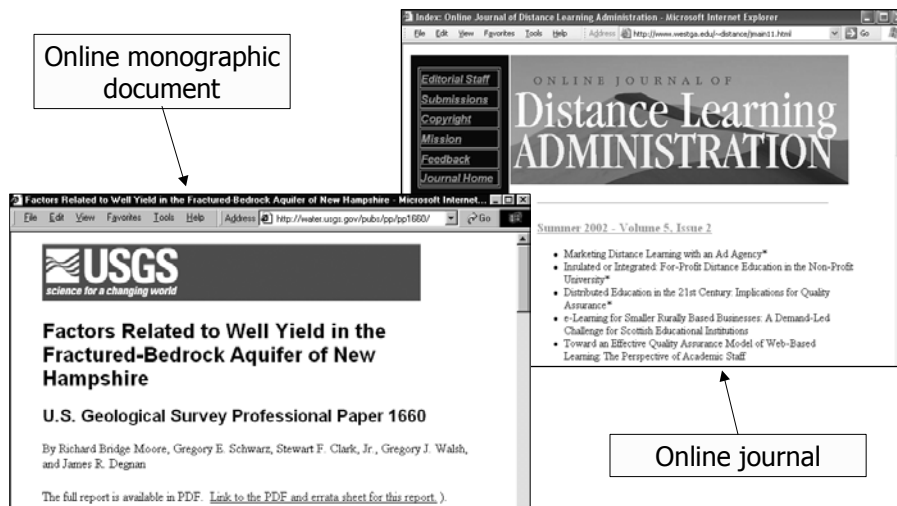
Online journal

Deciding what's what--LCRI 1.0 (formerly LCRI 12.0A)

- In deciding how to catalog a resource, consult LCRI 1.0 and ask the following questions:

- Will the resource be issued/updated on a continuing basis?
  - If it is basically complete, but may have been corrected, catalog as a monograph
  - If it is likely to be updated or added to over time, treat as a serial or integrating resource

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Decisions (2)

- Is the resource a direct access e-resource?
  - LCRI 1.0 assumes that a direct access resource *cannot* be an integrating resource
  - Ongoing CD-ROMs thus are serials, even when cumulative

- Is the resource issued in loose-leaf format?
  - Consider whether the base volume will be issued on a regular basis (serial) or not (IR)

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Decisions (3)

- Is the resource a remote access (online) resource?
  - Can you access any earlier issues or updates?
    - If no, consider to be integrating
    - If yes, treat as serial or as a multipart monograph

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Summary

- Many electronic resources and loose-leafs are *integrating resources* -- not monographs

- All direct access resources (e.g., CD-ROMs) issued in successive parts are to be cataloged as serials

- LCRI 1.0 provides guidance

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Session 1 Exercises

Each of the surrogates below represents an online resource. For each resource, answer the questions: **is it a monograph, a serial, or an integrating resource? Why or why not?**

Resource A

Resource B

Resource C (screen shot 1)

Resource C (screen shot 2)

Resource D

Satellites visible over LA - Updated Weekly - Microsoft Internet Explorer

File   Edit   View   Favorites   Tools   Help   Address http://www.astro.ucla.edu/~wright/sats.html

Satellites visible over Los Angeles - Updated Weekly

Artificial satellites orbiting the Earth are visible 1-2 hours after sunset and 1-2 hours before sunrise, while the ground is dark but the satellite is in sunlight because of its high altitude. This page lists predicted visibility times for some large and bright satellites of astronomical interest. These are easily visible even from the city of LA! The satellite will look like a moving star.

ISS is the International Space Station. It is quite bright and easy to see. HST is fainter, but can be quite bright when its solar panels are oriented correctly.

If you don't live in LA, the predictions on this page will not be useful for you, but the German Aerospace Center has a great satellite prediction page. Be sure to look at the Iridium flares! Here's a bright one over UCLA.

All times and dates Pacific Standard Time or Pacific Daylight Time.

Satellites with thrusters are sometimes way behind schedule, but these times are usually good to better than a minute.

Click on an entry to see a starchart with the satellite track. Planets and the Moon are in red, the satellite track is in blue.

Explanation of the table

ISS

```
  time at maxel      az     az'    maxel Range Sunel @sat  @sat'   DM Age
 8/10/ 2 20:55:17    27.0    0.3   10.6 1371.2 -13.9  6.3 -0.065  0.7  7
 8/11/ 2 21:35:44     4.9    0.6   29.8  718.1 -21.1  1.0 -0.065 -0.2  8
 8/12/ 2 20:40:54    33.0    0.4   18.2 1013.7 -11.7  6.9 -0.065 -0.2  9
 8/13/ 2 21:21:32   319.4    0.4   74.0  399.1 -19.2  1.0 -0.065 -2.1 10
 8/14/ 2 20:26:11    38.6    0.8   35.5  629.7  -9.4  8.9 -0.064 -1.4 11
 8/15/ 2 21: 6:43   228.4   -0.8   33.8  650.5 -17.1  3.7 -0.062 -0.8 12
 8/16/ 2 20:11: 8    64.7   38.9   88.7  384.5  -7.0 12.3 -0.061 -2.3 13
```

Resource E

Resource F

Resource G

Resource H

USDA Nutrient Database for Standard Reference, Release 15 - Microsoft Internet Explorer

File   Edit   View   Favorites   Tools   Help   Address   http://www.nal.usda.gov/fnic/foodcomp/Data/SR15/sr15.html

USDA **NUTRIENT DATA LABORATORY**   Agricultural Research Service

USDA National Nutrient Database for Standard Reference Release 15

This page provides access to Release 15 of the USDA National Nutrient Database for Standard Reference. You can either view the data here or download the data files and documentation in several different formats for use later on your computer. A search tool is also provided so you can look up the nutrient content of 6220 different foods directly from this home page.

Note: A few minor changes have been made to the SR15 data files since release. If you have downloaded the database between August 15, 2002 and September 6, 2002 you will want to look at these changes and download the revised database.   A list of the changes is available.

Resource I

ANGLO-AMERICAN CATALOGUING RULES

Second Edition

2002 Revision

Session 2a Original Cataloging of Integrating Resources (beginning)

Goals for Session 2

1. Learn the basics of original cataloging of integrating resources
   - With a focus on *electronic* integrating resources, and what is *new and different* after Dec. 1, 2002

2. Understand how to apply the new AACR2 rules for integrating resources
   - Primarily chapter 12, but also chapter 9 for electronic IRs

3. Understand how to apply new MARC coding practice for integrating resources

2
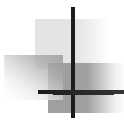
Outline of Session 2

Session 2a:
1. Tools for cataloging IRs
2. First steps in original cataloging
3. MARC leader and control fields
4. Bibliographic description: basis, chief source, areas 1-6

Session 2b:
5. Bibliographic description: areas 7-8
6. Linking entries
7. Access points

Session 2 Exercises

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Tools for cataloging integrating resources

- *Anglo-American Cataloguing Rules* (AACR2), Second Edition, 2002 Revision
  - Especially chapters 12, 1, and 9

- *Library of Congress Rule Interpretations* (LCRIs)

- *MARC 21 Format for Bibliographic Data*

- For OCLC members: *Bibliographic Formats and Standards*

- BIBCO and CONSER documentation

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First steps in original cataloging [1]

1. Determine the **aspect of the resource** that your bibliographic record will represent
   - E.g., the whole or a part of a larger resource (multipart item, monographic series, granular Web site) --See LCRI 1.0

2. Determine the **type of issuance** *of that aspect*
   - Monograph (single or multipart), serial, or integrating --See LCRI 1.0
   - Different aspects of a multilevel resource may have different types of issuance

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First steps in original cataloging [2]

3. Determine the **primary content** *of that aspect*
- E.g., textual, cartographic, visual, sound, computer file
- Affects which Type of Record and 008 / OCLC workform you use

4. Determine **which iteration** you have
   (when integrating)
- First, last, or other iteration
- Affects especially how you record dates of publication

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MARC Leader and Control Fields

- Type of record (Leader/06 ; OCLC "Type")
  - Primary content

- Bibliographic level (Leader/07 ; OCLC "BLvl")
  - Type of issuance

- Control fields 006 and 008 (OCLC fixed fields)
  - Fixed length coded data elements for different types of material (e.g., books, maps, computer files, etc.)

- Control field 007
  - Physical characteristics fixed field

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Type of record (Leader/06)
(OCLC: Type)

- Select code for primary content of resource
  - Regardless of physical carrier (print, electronic, etc.)

- For example:
  - **a** – Language material
    - Includes primarily textual Web sites & databases, disregarding incidental images, search software, etc.
  - **m** - Computer file
    - Restricted to computer software, computer-manipulable numeric data, computer-oriented multimedia, online systems or services
  - **e** – Cartographic material
  - **k** – Still images ("two-dimensional non-projectable graphic")
  - **g** – Moving images ("projected medium")
  - **j** – Musical sound recordings

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Bibliographic level (Leader/07)
(OCLC: BLvl)

- **m** – Monograph
- **s** – Serial
- **i** – **Integrating**
- All updating loose-leafs, updating Web sites, and updating databases are integrating
- *Reminder:* records for integrating resources with Type = a (Language material) will have a Continuing resource 008. However, records for integrating resources with other Type values will have the 008 for that Type. For example, records with Type = m (Computer file) will have the Computer file 008 and records with Type = e (Cartographic material) will have the Maps 008.

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Electronic resources 006/008 elements

- Form of item (OCLC: <u>Form</u> and <u>Orig</u>)
  - Code "**s**" – Electronic
  - Use this code for all electronic resources in:
    - "Form of Item" (008/23; 006/06)
    - "Form of Original Item" (008/22; 006/05)

- Type of computer file (OCLC: <u>File</u>)
  - See Appendix A for list of codes
  - Use this code in Electronic resources/Computer files 008 or 006
  - [Will cover use of different codes in Session 5 of this workshop]

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Continuing resources 006/008 elements

- Frequency
- Regularity
- Type of continuing resource
  (formerly: Type of serial)
- ISSN center
- Form of original item
- Form of item

- Nature of entire work
- Nature of contents
- Government publication
- Conference publication
- Original alphabet or script of title
- Entry convention
  (formerly: Successive/latest entry)

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Frequency (Freq) and Regularity (Regl)

Frequency codes:

Examples of selected codes; see Appendix A for complete list.

- **blank** - No determinable frequency (irregular)
- **d** - Daily
- **k** - Continuously updated (= more frequently than daily)
- **m** - Monthly
- **q** - Quarterly
- **u** - Unknown
- **w** - Weekly

Regularity codes:

- **r** - Regular
- **n** - Normalized irregular
- **x** - Completely irregular
- **u** - Unknown

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Type of continuing resource
(OCLC: SrTp)

- Codes for integrating resources:
    - **d** - Updating database
    - **l** - Updating loose-leaf
    - **w** - Updating Web site

- Codes for serials:
    - **m** - Monographic series
    - **n** - Newspaper
    - **p** – Periodical
    - blank – None of the others

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Entry convention (OCLC: S/L)

- Codes for serials:
  - **0** - Successive entry
  - **1** - Latest entry

- New code for integrating resources:
  - **2** – Integrating entry
    - Record is cataloged under its latest (most recent) title and/or responsible person or body.
    - A new record is made only when there is a major change in edition, or it is determined that there is a new work, or for mergers and splits.

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007 – Physical description control field

Computer files/Electronic resources 007 elements:

- $a – code "**c**" for category "Computer file"
- $b – code "**r**" for specific type "Remote access"
- $d – select correct code for color aspects of resource
- $e – code "**n**" for dimensions "Not applicable"
- $f – select correct code for sound aspects of resource
- $g → $l – Optional (used primarily for archival control)

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Example 1: Leader and control fields for updating Web site

The Library of Congress >> Cataloging

The LIBRARY *of* CONGRESS **BIBCO CONSER NACO SACO**

Program for Cooperative Cataloging

PCC Home >>   Find [   ] in [PCC Pages ▼] GO

Type: a	ELvl: l	Srce: d	GPub: f	Ctrl:	Lang: eng
BLvl: i	**Form: s**	Conf: 0	Freq:	MRec:	Ctry: dcu
S/L: 2	**Orig: s**	EntW:	Regl: x	Alph:	
Desc: a	**SrTp: w**	Cont:	**DtSt: c**	**Dates: 199u,9999**	

006 ER: Audn: **File: d**   GPub: f
007 ER: c $b r $d m $e n

Example 2: Leader and control fields for updating database

USDA Nutrient Database for Standard Reference, Release 15 - Microsoft Internet Explorer

File   Edit   View   Favorites   Tools   Help   Address http://www.nal.usda.gov/fnic/foodcomp/Data/SR15/sr15.html

USDA **NUTRIENT DATA LABORATORY** **ars** Agricultural Research Service

**USDA National Nutrient Database for Standard Reference
Release 15**

Type: a	ELvl: l	Srce: d	GPub: f	Ctrl:	Lang: eng
BLvl: i	**Form: s**	Conf: 0	Freq:	MRec:	Ctry: mdu
S/L: 2	**Orig: s**	EntW:	Regl: x	Alph:	
Desc: a	**SrTp: d**	Cont:	**DtSt: c**	**Dates: 199u,9999**	

006 ER: Audn: **File: d**   GPub: f
007 ER: c $b r $d m $e n

Example 3: Leader and control fields for updating loose-leaf
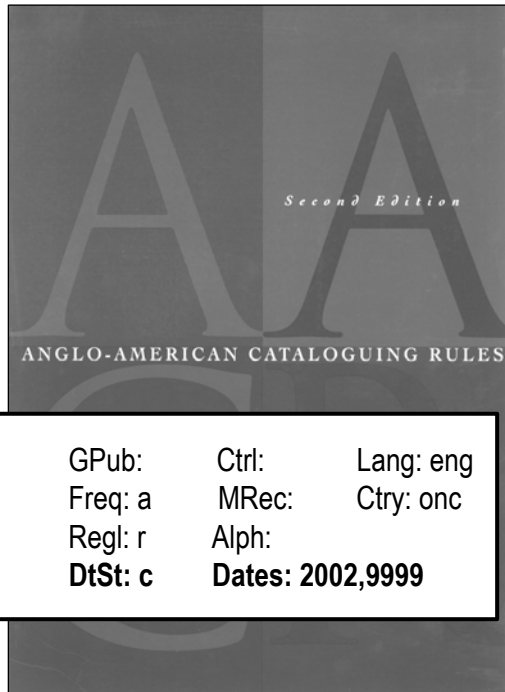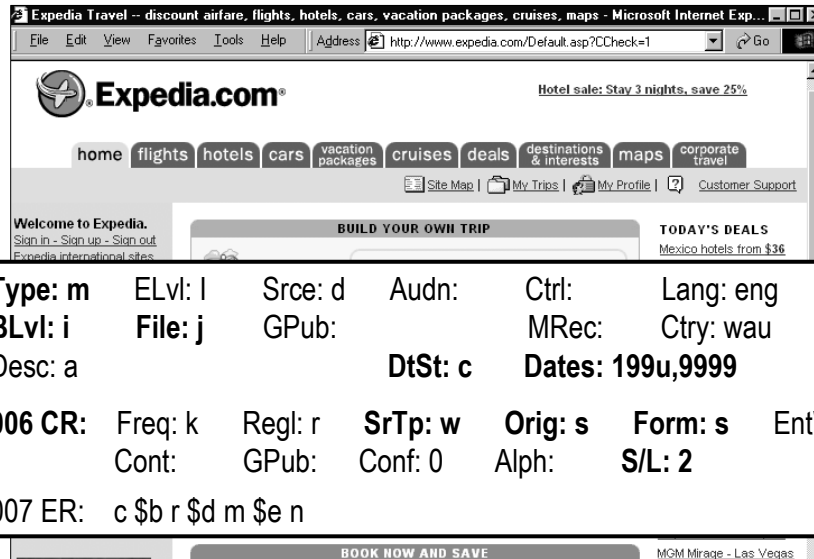
Type: a	ELvl: I	Srce: d	GPub:	Ctrl:	Lang: eng	
BLvl: i	**Form:**	Conf: 0	Freq: a	MRec:	Ctry: onc	
S/L: 2	**Orig:**	EntW:	Regl: r	Alph:		
Desc: a	**SrTp: l**	Cont: b	**DtSt: c**	**Dates: 2002,9999**		

Example 4: Leader and control fields
for updating cartographic Web site

Home Page - The National Atlas of the United States of America - Microsoft Internet Explorer

File   Edit   View   Favorites   Tools   Help   Address   http://www.nationalatlas.gov/index.html

national*atlas*.gov™
where we are
Text Mode

Type: e	ELvl: I	Srce: d	Relf: bac	Ctrl:	Lang: eng
BLvl: i	**Form: s**	GPub: f	SpFm: z	MRec:	Ctry: vau
CrTp: e	Indx:	Proj:	**DtSt: c**	**Dates: 1997,9999**	
Desc: a					

006 ER:	Audn:	**File: c**	GPub: f		

006 CR:	Freq:	Regl: x	**SrTp: w**	**Orig: s**	**Form: s**	EntW:
	Cont:	GPub: f	Conf: 0	Alph:	**S/L: 2**	

007 ER: c $b r $d m $e n

007 MAP: a $b d $d c $e z $f n $g z $h n

Example 5: Leader and control fields for updating online service Web site

Type: m	ELvl: I	Srce: d	Audn:	Ctrl:	Lang: eng	
BLvl: i	**File: j**	GPub:		MRec:	Ctry: wau	
Desc: a			**DtSt: c**	**Dates: 199u,9999**		
006 CR:	Freq: k	Regl: r	**SrTp: w**	**Orig: s**	**Form: s**	EntW:
	Cont:	GPub:	Conf: 0	Alph:	**S/L: 2**	
007 ER:	c $b r $d m $e n					

AACR2--Bibliographic Description Basis of the description: 12.0B1b

Areas based on <u>current</u> iteration:
- 1. Title and statement of responsibility
- 2. Edition
- 4. Publication, distribution, etc.
  - Except dates
- 5. Physical description
  - Optional for remote e-resources
- 6. Series

Area based on <u>first and/or last</u> iteration(s):
- 4F. Dates of publication, distribution, etc.

Areas based on <u>all</u> iterations and any other source:
- 7. Note
- 8. Standard number and terms of availability

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Chief Source of Information: 12.0B2b

- Printed integrating resources:
    - Title page or title page substitute
- Nonprint integrating resources:
    - Follow directions in subrule .0B in the relevant chapter

- For electronic integrating resources: Rule 9.0B:
    - The chief source of information is the resource itself
    - Take the title proper from formally presented evidence
    - If the title information presented in these sources varies in degree of fullness, prefer the source that provides the most complete title information

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Area 1: Title and statement of responsibility

- Title proper (245 $a, $n, $p)
- GMD ($h)
- Parallel titles ($b)
- Other title information ($b)
- Statements of responsibility ($c)

- Note: the MARC subfield codes given above reflect the most common situations, but there are other situations where the data elements in a title and statement of responsibility require different coding and/or arrangement.

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Source of title proper example 1

Title page

ANGLO-AMERICAN
CATALOGUING
RULES

Second Edition

2002 Revision

Prepared under the direction of
THE JOINT STEERING COMMITTEE FOR REVISION OF AACR
a committee of:
The American Library Association
The Australian Committee on Cataloguing
The British Library
The Canadian Committee on Cataloguing
Chartered Institute of Library and Information Professionals
The Library of Congress

```
245 00 Anglo-American cataloguing rules
```

CANADIAN LIBRARY ASSOCIATION / *Ottawa*
CHARTERED INSTITUTE OF LIBRARY AND INFORMATION PROFESSIONALS / *London*
AMERICAN LIBRARY ASSOCIATION / *Chicago*

Common sources of title proper in **online** integrating resources

- Formal title display on home page screen
  - May be HTML text, graphic (image file), or both; may appear in more than one form
- HTML header title
  - Displayed in browser title bar (also viewable by selecting *View → Source*)

- Sources of "formally presented" titles include:
  - title screen, main menus, program statements, initial display of information, home page, the file header including "Subject:" lines, encoded metadata (e.g., TEI headers, HTML/XML meta tags)

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Source of title proper example 2

Home page title display (graphic) and HTML header title are identical

Program for Cooperative Cataloging - Microsoft Internet Explorer

File   Edit   View   Favorites   Tools   Help   Address   http://lcweb.loc.gov/catdir/pcc/   Go

080784

PROGRAM FOR
Cooperative Cataloging

For information on the components of the Program for Cooperative Cataloging (PCC), click on the name below:
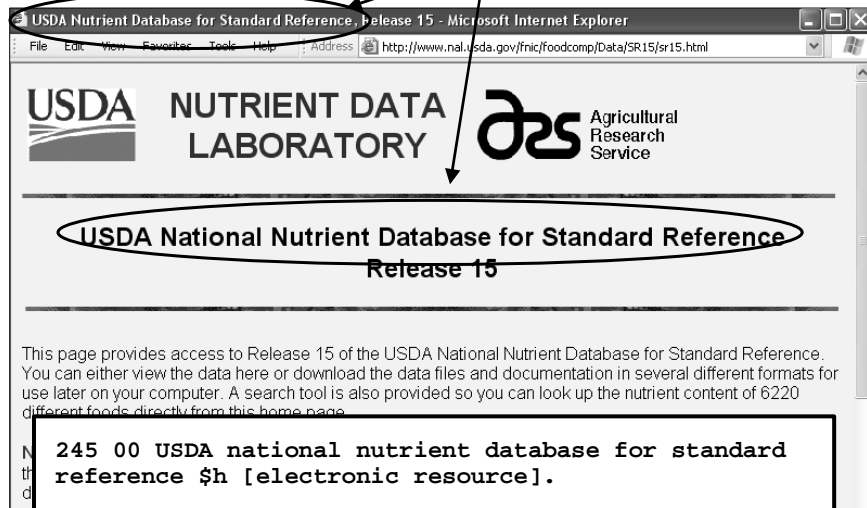
BIBCO   CONSER   NACO   SACO

About the PCC   PCC Organization

```
245 10 Program for Cooperative Cataloging $h [electronic
resource] : $b [Web site].
```

Source of title proper example 3

Home page title display (HTML text) and HTML header title are not identical

USDA Nutrient Database for Standard Reference, Release 15 - Microsoft Internet Explorer

File   Edit   View   Favorites   Tools   Help   Address   http://www.nal.usda.gov/fnic/foodcomp/Data/SR15/sr15.html

USDA   NUTRIENT DATA
LABORATORY   a2s   Agricultural
Research
Service

USDA National Nutrient Database for Standard Reference
Release 15

This page provides access to Release 15 of the USDA National Nutrient Database for Standard Reference. You can either view the data here or download the data files and documentation in several different formats for use later on your computer. A search tool is also provided so you can look up the nutrient content of 6220 different foods directly from this home page.

```
245 00 USDA national nutrient database for standard
reference $h [electronic resource].
```

Transcription of title proper: 1.1B1 and 12.1B1-4

- Do not transcribe introductory words not intended to be part of the title, such as "Welcome to"; instead give the title with these words in a note (1.1B1)

- Correct obvious typographic errors and give title as it appears in a note (12.1B1)

- When title appears in full and in the form of an acronym or initialism, choose the full form (12.1B2)
  - e.g., *Program for Cooperative Cataloging* instead of *PCC*

- If resource is a part of another resource and bears both the common title and its own section title, give both in that order, separated by a period (12.1B4)
  - Will not often apply to online resources: see LCRI 12.1B4

28

Transcription of title proper example 1

"Welcome to …" in HTML header title


```
245 04 The plants national database $h [electronic resource].

246 1_ $i Title in HTML header: $a Welcome to the plants national
database

246 1_ $i Title on home page: $a Plants database
```

Transcription of title proper example 2

Title appears in full and in form of acronym
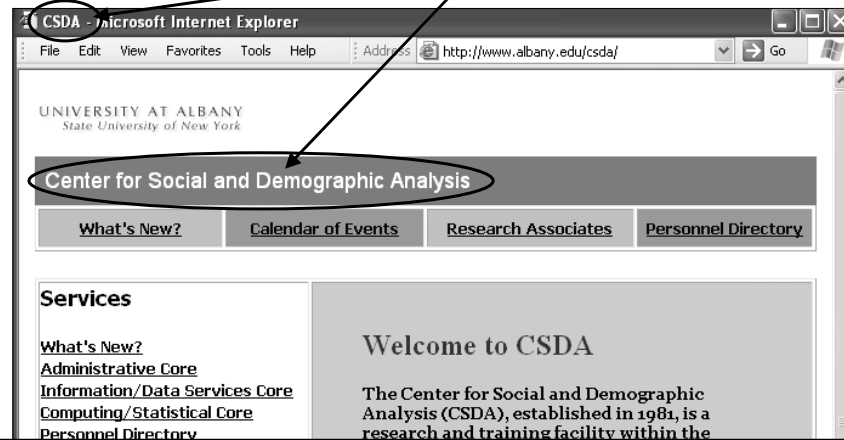
245 10 Center for Social and Demographic Analysis $h
[electronic resource] : $b [Web site].

246 1_ $i Title in HTML header: $a CSDA

Parallel title example

245 00 Government of Canada site $h [electronic resource]
= $b Site du gouvernement du Canada.

246 31 Site du gouvernement du Canada

Transcription of other title information: 12.1E1b

- Per 2004 update to AACR2, always include:
  - Acronym if full form is title proper
  - If contains statement of responsibility or publisher, etc.
  - Supply information if title proper is only name of body

- Can always transcribe if considered to be important

- Do not transcribe if it consists only of words relating to the currency of the contents or the frequency of updating (12.1E)

32

Other title information and statement of responsibility example

The Nine Planets - Microsoft Internet Explorer

File   Edit   View   Favorites   Tools   Help   Address   edu/nineplanets/nineplanets/nineplanets.html   Go

The Nine Planets

A Multimedia Tour of the Solar System

by Bill Arnett

The Nine Planets is an overview of the history, mythology, and current scientific knowledge of each of the planets and moons in our solar system. Each page has text and images, some have sounds and movies, most provide references to additional related information.

Interplanetary spacecraft have revolutionized planetary science. Very little of this document would have been possible without the space program.

```
245 14 The nine planets $h [electronic resource] : $b a
multimedia tour of the solar system / $c by Bill Arnett.
```

Other title information for transcription?


```
245 00 FirstGov $h [electronic resource].
```

OR:

```
245 00 FirstGov $h [electronic resource] : $b your first
click to the U.S. government.
```

Variant forms of title:
1.7B4, 12.7B4.1, 9.7B4, 21.30J2

- Make notes on titles borne by the item other than the title proper (12.7B4.1, 9.7B4)

- Make notes on titles by which the resource is commonly known if considered to be important (1.7B4, 12.7B4.1)

- If considered important for access, make an added entry for any version of the title that is significantly different from the title proper (21.30J2 & LCRI)

- In MARC record: **246 field** can serve as both note and added title entry.

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Title variants examples 1 & 2

245 00 **Anglo-American cataloguing rules** / $c prepared under the direction of the Joint Steering Committee for Revision of AACR, a committee of the American Library Association ... [et al.].

246 1_ $i Commonly known as: $a AACR2

245 10 **Program for Cooperative Cataloging** $h [electronic resource] : $b [Web site].

246 1_ $i Commonly known as: $a PCC

Title variants example 3

Home page title display and HTML header title differ
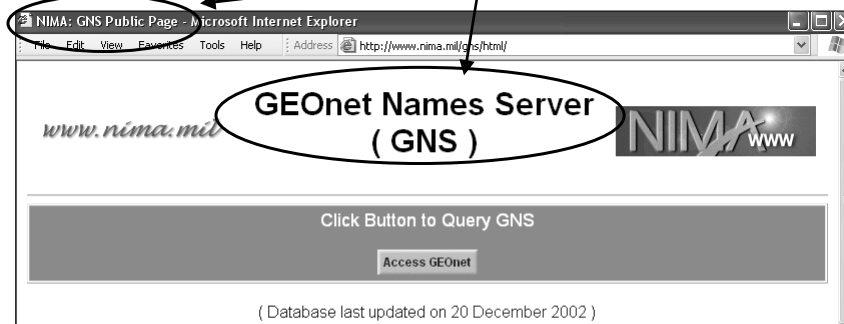
245 00 **GEOnet names server** $h [electronic resource] : **$b GNS.**

246 1_ **$i Title in HTML header: $a NIMA : $b GNS public page**

246 30 **GNS**

246 3_ **GNS public page**

Area 2: Edition

- 12.2B: Transcribe an edition statement if considered to be important
  - 9.2B1: A statement that indicates that the electronic resource contains differences from other editions of that resource, or that names a reissue of the resource
  - 9.2B2: In case of doubt, take words such as edition, issue, version, etc. as indicating an edition statement

- 12.2B2: Do not transcribe statements indicating regular revision or frequent updating as edition statements
  - Instead give as frequency information in the note area (see also 12.7B1).

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Edition statement examples 1 & 2

Printed updating loose-leaf

ANGLO-AMERICAN
CATALOGUING
RULES

Second Edition
2002 Revision

Prepared under the direction of
THE JOINT STEERING COMMITTEE FOR REVISION OF AACR
a committee of:
The American Library Association
The Australian Committee on Cataloguing

245 00 Anglo-American cataloguing rules

250   2nd ed., 2002 revision.

CANADIAN LIBRARY ASSOCIATION / *Ottawa*
CHARTERED INSTITUTE OF LIBRARY AND INFORMATION PROFESSIONALS / *London*
AMERICAN LIBRARY ASSOCIATION / *Chicago*

Online updating document

org/bibformats/pdf/front.pdf - Microsoft Internet Explorer
avorites   Tools   Help   Address   http://www.oclc.org/bibformats/pdf/front.pdf   Go

Document information

Last updated: June 2002
Revision history
ISBN: 1-55653-315-2
Copyright: 2002

**Bibliographic Formats and
Standards**

Third Edition

245 00 Bibliographic formats and
     standards $h [electronic resource].

250   3rd ed.

Edition statement example 3

Online updating database

USDA National Nutrient Database for Standard Reference
Release 15

This page provides access to Release 15 of the USDA National Nutrient Database for Standard Reference. You can either view the data here or download the data files and documentation in

How do I reference the USDA Nutrient Database for Standard Reference?

From FAQ page

U.S. Department of Agriculture, Agricultural Research Service. 2002. USDA Nutrient Database for Standard Reference, Release 15. Nutrient Data Laboratory Home Page, http://www.nal.usda.gov/fnic/foodcomp

Note: Release numbers change as new versions are released.

```
245 00 USDA national nutrient database for standard
reference $h [electronic resource].
```

No edition statement

Area 3: Numbering [chapter 12]

- 12.3A1b: this area is not generally applicable to integrating resources

- Numbering is given for serials because they have discrete parts that normally require numbering to distinguish them from each other

  - Note: numbering on loose-leaf updates is not the same as issue numbering for serials and is not recorded in this area.

41

Area 3: Type and extent of resource [chapter 9]

- This area was eliminated with the deletion of rule 9.3 in the 2004 update to AACR2

- If this area was used in the description and the type and/or extent changes, delete the 256 field

42

Area 4: Publication, distribution, etc.

- 9.4B2: "Consider all remote access electronic resources to be published"

- Record place of publication and publisher name.
  - Where to look in online resources:
    - Bottom of home page
    - "About" page (a common hyperlink from home page)
    - Publisher information page (link from home page)
    - Domain name in URL may provide clues or corroboration for publisher
    - Generally prefer a corporate body name as publisher

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Publisher place and name example 1


```
260    Beltsville, MD : $b USDA Nutrient Data
Laboratory, Agricultural Research Service
```

Publisher place and name example 2


```
260    [St. Paul, MN] : $b University of Minnesota
```

Dates of publication, distribution, etc.

The beginning and ending dates for the active life span of the integrating resource

> - **Beginning date** = the date of publication of the **first iteration** of the resource (in print or on the Internet)
>
> - **Ending date** = the date of the **last iteration** of the resource = the date it ceases to be updated

- Most will be ongoing, actively-updated resources; when a date can be given it will be an "open" date, indicated by a hyphen and no period; e.g., 260 … $c 1997**-**

- **12.0B1: Basis of description for dates** = **first** and/or **last iteration** of the integrating resource

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Recording dates of publication: 12.4F1-2 and 1.4F8

- **1.4F8: main rule:**

    - If the first and/or last iteration **is** available, give the beginning and/or ending dates in area 4 [260$c]

    - If first/last iteration **is not** available, do not give the date(s) in this area; instead, give date information in a note if it can be readily ascertained

- **1.4F8: optional rule:**

    - Supply the date(s) in this area if they can be readily ascertained

    - **LCRI** 1.4F8: apply this option on a case-by-case basis when the resource includes an explicit statement

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Informal quick guide for handling IR dates if following LCRI 1.4F8

Do you have the first iteration?

■ **Yes:**
   - Give a known date, or supply an approximate date in brackets, in 260 $c

■ **No, or not sure:**
   - Supply a date in brackets in 260 $c if there is an explicit statement
   - If no explicit statement, state an approximate date in a 362 1_ note
   - A copyright date is *not* an explicit statement

48

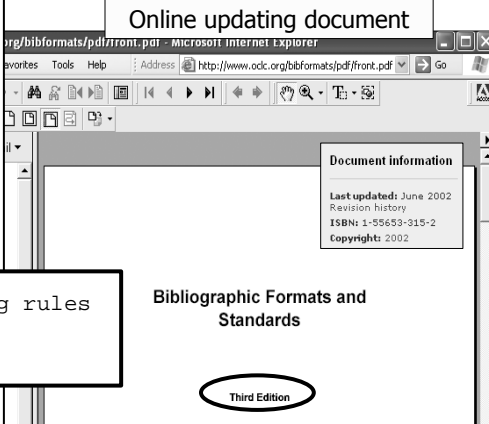# Dates of publication example 1

You know that you have the first iteration of loose-leaf

ANGLO-AMERICAN
CATALOGUING
RULES

Second Edition
2002 Revision

Prepared under the direction of
THE JOINT STEERING COMMITTEE FOR REVISION OF AACR
a committee of:
   The American Library Association
   The Australian Committee on Cataloguing
   The British Library
   The Canadian Committee on Cataloguing
   Chartered Institute of Library and Information Professionals
   The Library of Congress

Published 2002 by
CANADIAN LIBRARY ASSOCIATION
328 Frank Street, Ottawa, Ontario K2P OX8
ISBN 0-88800-299-9 (text only)
ISBN 0-88800-300-6 (text with binder)
Facet Publishing for
CHARTERED INSTITUTE OF LIBRARY AND INFORMATION PROFESSIONALS
7 Ridgmount Street, London WC1E 7AE
ISBN 0-85604-469-6 (text only)
ISBN 0-85604-470-X (binder only)
AMERICAN LIBRARY ASSOCIATION
50 East Huron Street, Chicago, Illinois 60611
ISBN 0-8389-3529-X (text with binder)
ISBN 0-8389-3530-3 (text only)

Published 2002 by

CANADIAN LIBRARY ASSOCIATION ... Ottawa

CHARTERED INSTITUTE OF LIBRARY AND INFORMATION PROFESSIONALS ... London ...

AMERICAN LIBRARY ASSOCIATION ... Chicago

Library of Congress Cataloging-in-Publication Data
Anglo-American cataloguing rules / prepared under the direction of the Joint
Steering Committee for Revision of AACR, a committee of the American
Library Association ... [et al.]. — 2nd ed., 2002 revision.
p. cm.
Includes bibliographical references and index.

```
260     Ottawa : $b Canadian Library Association ; $a
Chicago : $b American Library Association, $c 2002-

008     DtSt: c    Dates: 2002,9999
```

Multiple dates: beginning and ending dates; "9999" indicates ongoing into indefinite future

c = currently published

Dates of publication example 2

080784

P R O G R A M   F O R
Cooperative Cataloging

For information on the components of the Program for Cooperative Cataloging (PCC), click on the name below:

BIBCO | **CONSER** | **NACO** | **SACO**

About the PCC

- Información sobre el PCC en Español
- Informações sobre o PCC em Português

PCC Organization

- PCC Policy Committee, Steering Committee, and Advisors

> You know that you are not viewing the first iteration
>
> There is no information anywhere within the Web site about its beginning date

```
260      Washington, DC : $b Library of Congress

362 1_ Began in 1990s.

008    DtSt: c    Dates: 199u,9999
```

> No terminal punctuation

> Multiple dates: beginning date approximate; ending date indefinite

> c = currently published

Dates of publication example 3

KYOTO   TWIN CITIES   CAMBRIDGE

Kyoto University Ligand Chemical Database | University of Minnesota Biocatalysis/Biodegradation Database | EMBL Nucleotide Sequence Database

**The University of Minnesota
Biocatalysis/Biodegradation Database**

...ic reactions and biodegradation pathways primarily for xenobiotic, chemical co...
[UK mirror] [UK Stats] [KEGG mirror] [KEGG Stats]

...] [About the UM-BBD] [What's New] [FAQs] [Guest Book] [Contributors] [Guided T...
[Useful Internet Resources] [Acknowledgements] [Privacy Policy]

- What's New? Last updated July 11, 2002.

> This is **not** publication info.!

> You know that you are not viewing the first iteration
>
> Bottom of home page has:
>   **© 2002**
>
> --indicates current year; not beginning date of resource!

Page Author: Lynda Ellis

July 11, 2002 BBDMaster@mail.ahc.umn.edu

© 2002, University of Minnesota.
All rights reserved.

http://umbbd.ahc.umn.edu/index.html

One option:

```
260      [St. Paul, MN] : $b University of Minnesota

008    DtSt: c    Dates: uuuu,9999

[No 362 1_ note given]
```

> No ending punctuation
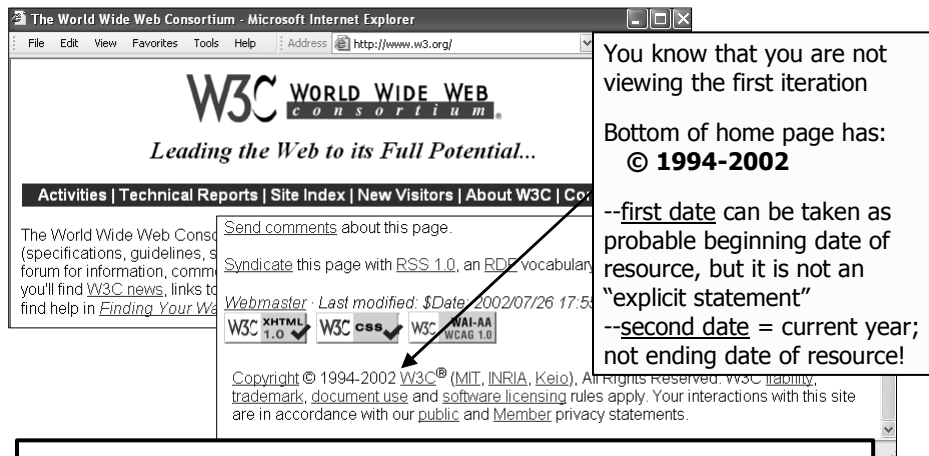
Dates of publication example 3: some alternative options

```
260     [St. Paul, MN] : $b University of Minnesota
362 1_ Began in 1990s?
008     DtSt: c    Dates: 199u,9999
```

```
260     [St. Paul, MN] : $b University of Minnesota
362 1_ Began between 1990 and 2002.
008     DtSt: c    Dates: 199u,9999
```

• There are other possible ways to word the note --if you consider that it offers useful information to catalogers and/or other catalog users in the future. If not, do not give a note.

• Might a researcher in the year 2045, for example, find such information to be of some value?

Dates of publication example 4

You know that you are not viewing the first iteration

Bottom of home page has:
© 1994-2002

--first date can be taken as probable beginning date of resource, but it is not an "explicit statement"
--second date = current year; not ending date of resource!

```
260     [Cambridge, Mass.] : $b World Wide Web Consortium
362 1_ Began in 1994?        Or:  362 1_ Began ca. 1994.
008     DtSt: c    Dates: 1994,9999
```

Dates of publication example 5

THE EMBL REPTILE DATABASE - Microsoft Internet Explorer

File   Edit   View   Favorites   Tools   Help   Address   http://www.embl-heidelberg.de/~uetz/LivingReptiles.html   Go

THE EMBL REPTILE DATABASE

This database is maintained by Peter Uetz, Res
Chenna, European Molecular Biology Laborato
Etzold, European Bioinformatics Institute (EBI, s
Museum Hamburg (new species and updates).
database.org). Copyright © 1995-2002 by Pete

Created: 10 Nov 1995 / Last changed or updated: 10 Dec 2002

> You know you are not viewing first iteration
>
> Home page has **explicit statement**:
>   "Created 10 Nov 1995"
>
> Following LCRI 1.4F8, date given in 260 $c
> --in brackets because not from 1st iteration

```
245 04 The EMBL reptile database $h [electronic resource].

260    Heidelberg [Germany] : $b EMBL, $c [1995]-

008    DtSt: c    Dates: 1995,9999
```

Dates of publication example 6

Guide to Computing and Communications Resources - Microsoft Internet Explorer

elp   Address   http://istpub.berkeley.edu:4201/gccr/

> You are viewing the final iteration of the Web site
>
> The ending date is explicitly stated in this last iteration
>
> The beginning date was not known at the time of original cataloging, and the first iteration was not available.

university of california, b

GUIDE TO COMPUTING and COMMUNICATIONS RESOURCES

information systems and technology

> Statement that updates have ceased as of August 2000

This site is no longer being maintained. As of August 2000, it has been superseded by an updated Information Systems and Technology site and the UC Berkeley Computing and Communications site. For up-to-date information about the

```
260    [Berkeley, Calif.] : $b Information Systems and
Technology, University of California, Berkeley, $c –2000.

362 1_ Began in 1990s.

008    DtSt: d    Dates: 199u,2000
```

> d = ceased publication

Area 5: Physical description

- As of the 2004 Update to AACR2, area 5 can be used for remote access resources

  - Optional rules 9.5B3 and 9.5C3

  - No specific PCC practice: local decision or cataloger's judgment

  - LC practice: case-by-case basis

56
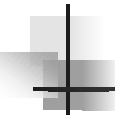
Area 5: Physical description

- 12.5B: Extent of item for updating loose-leafs:
  - Add the qualifier *(loose-leaf)*
  - For ongoing loose-leaf:
    - No number of volumes given:
      - **300 $a v. (loose-leaf)**

```
245 00 Anglo-American cataloguing rules
250    2nd ed., 2002 revision.
300    v. (loose-leaf) ; $c 30 cm.
```

  - For completed loose-leaf:
    - Number of volumes added:
      - **300 $a 3 v. (loose-leaf)**

57

Area 6: Series

- Nothing new or different for integrating resources
- Record series statements (4XX) present on the *current* iteration of the resource
- Use MARC 440, 490, and 8XX as usual
- Not very common in online integrating resources

58

Bib. Description for our three examples so far (1-2)

```
008    DtSt: c   Dates: 199u,9999

245 10 Program for Cooperative Cataloging $h [electronic
resource] : $b [Web site].

246 1_ $i Commonly known as: $a PCC

260    [Washington, D.C.] : $b Library of Congress

362 1_ Began in 1990s.
```

```
008    DtSt: c   Dates: 199u,9999

245 00 USDA national nutrient database for standard
reference $h [electronic resource].

246 1_ $i Title in HTML header: $a USDA nutrient database
for standard reference

260    Beltsville, MD : $b USDA Nutrient Data Laboratory,
Agricultural Research Service

362 1_ Began in 1990s.
```

Bib. Description for our three examples so far (3)

```
008    DtSt: c   Dates: 2002,9999

245 00 Anglo-American cataloguing rules / $c prepared under
       the direction of the Joint Steering Committee for
       Revision of AACR, a committee of the American Library
       Association ... [et al.].

246 1_ $i Commonly known as: $a AACR2

250    2nd ed., 2002 revision.

260    Ottawa : $b Canadian Library Association ; $a Chicago
       : $b American Library Association, $c 2002-

300    v. (loose-leaf) ; $c 30 cm.
```

Session 2b Original Cataloging of Integrating Resources (conclusion)

Session 2b
Original Cataloging, continued

Session 2b covers:

➢ Bibliographic description areas 7-8

➢ Access points

➢ Linking entry fields

➢ Final records for three resources

1

Area 7: Notes

- **This workshop covers only notes new or mandatory for IRs:**
  - Frequency (310/321)
  - Nature and scope, system requirements, and mode of access (516, 538)
  - Source of title proper (500)
  - Bibliographic history and relationships (530, 580, 76X-78X)
  - Item described (500)

- MARC tagging for many notes is the same for both serials and integrating resources
  - **247/547** for former title proper information
  - **310/321** for current and former frequency of updates
  - **362 1** for publication date information when not from first/last iteration
  - **550** for issuing bodies information
  - **530, 580, 76X-78X** for bibliographic relationships and links

2

Frequency note: 12.7B1

- Note the frequency of updates to an integrating resource
  - Unless:
    - Frequency is apparent from content of the title and statement of responsibility area
    - Frequency of updates is unknown
  - LCRI 12.7B1 (LC/PCC practice):
    - Always give a note for known frequency of updates, even if already apparent from the rest of the description

3

Frequency and regularity example 1

1) You know that this loose-leaf will be updated annually on a regular basis

PREFACE TO THE 2002 REVISION

The printed version of the 2002 revision of the second edition of the *Anglo-American Cataloguing Rules* (AACR) represents a milestone in the publishing history of the code. It is being issued as an integrating resource, in loose-leaf format for updating. Updates to the rules will be released annually; this is in recognition of the fact that changes to the rules are occurring more frequently than in the past and are often substantial.

ANGLO-AMERICAN CATALOGUING RULES

2002 Revision

```
245 00 Anglo-American cataloguing rules

250    2nd ed., 2002 revision.

310    Updated annually

008    Freq: a   Regl: r
```

Frequency and regularity example 2

2) You know that this database is regularly updated every three months

THE EMBL REPTILE DATABASE

Update Schedule
The database is updated every 3 months (in March, June, September, and December). Depending on submissions from contributors, the amount of updated material may differ. The date of the latest update is given on the Home Page headline or on the News Page .

What's new (6/2002)
Introduction (and FAQ)
Publications
How many species?
Links
Reptiles as pets

Lizards   Snakes   Tuataras

```
245 04 The EMBL reptile database $h [electronic resource].

310     Updated quarterly

008     Freq: q    Regl: r
```

Frequency and regularity example 3

3) You know that this database is updated on a monthly basis but regularly skips certain months

NESTOR

Bibliography of Aegean Prehistory and Related Areas

Published monthly, September to May, by the Department of Classics, University of Cincinnati
P.O. Box 0226, Cincinnati, Ohio 45221-0226, U.S.A.

Editor: Carol Hershenson *Assistant Editors:* Evi Gorogianni, K. Mark Armstrong, Dan L. Davis, Erin W. Lopp

Home Page

History & Subscription Info. | Search the Nestor Database | IDAP | Links | Feedback

Contents of this Site | **News and Additions**

```
245 00 Nestor $h [electronic resource] : $b bibliography
    of Aegean prehistory and related areas.

310     Updated monthly (except June-Aug.)

008     Freq: m    Regl: n
```

Frequency and regularity examples 4-6

4) You know that this Web site is updated on a very frequent basis
[Regl code "k" = continuously updated; defined as "more frequently than daily"]

Weather.com Web site
[http://www.weather.com/]

310   Continuously updated

008   Freq: k   Regl: r

5) You know that this Web site is updated irregularly (no regular pattern)

CONSER Web site
[http://www.loc.gov/acq/conser/]

310   Updated irregularly

008   Freq: _   Regl: x

6) You know that this database is updated but have no information about how often or according to a regular or irregular pattern

Global invasive species database

[No 310 present]

008   Freq: u   Regl: u

Former frequency note

245 00 Drug interaction handbook / $c editors, Kenneth
    A. Scott ; Julie B. Olin.

260   Denver : $b MedFacts, $c c1996-

300   v. (loose-leaf) ; $c 27 cm.

310   Updated quarterly, $b July 2001-

321   Updated semiannually, $b Jan. 1996-June 2001

008   Freq: q   Regl: r

8

For electronic integrating resources:

Nature and scope, system requirements, and mode of access note: 9.7B1

- a) Nature and scope
  - Make notes on nature and scope of the resource if not apparent from rest of description
    - 516   Computer game.

- b) System requirements
  - Note system requirements only if special software or hardware are required to access and use the resource
    - 538   System requirements: Adobe Acrobat reader.

- c) Mode of access
  - Always specify the mode of access for remote access resources
    - 538   Mode of access: World Wide Web.

9

Nature and scope note, and System requirements note

National NAGPRA Database

The documents related to the Native American Graves Protection and Repatriation Act are organized in the five categories listed below. The date following a document indicates its publication date. The date following a directory (shown in capital letters) indicates when the last item in the list was last updated.

See Also
Native American Consultation Database

Two directories under the Notice category contain numerous documents. A search engine is now available in each Notice directory to facilitate finding a document by specific tribe, museum, or other keyword.

The documents are provided in text and PDF format. The user must have a PDF viewing software such as the free AdobeTM Acrobat Reader to view the PDF documents. Another option is to choose "*load to local disk*" option from the Options menu on Mosaic or the "*Save As...*" option from the File menu on Netscape to download the file and view it later.

```
516      Text (HTML and PDF).

538      System requirements: Adobe Acrobat reader to
view and print PDF files.

538      Mode of access: World Wide Web.
```

Source of title proper note: 12.7B3

- Printed integrating resources:
  - Make a note on the source of the title proper if it is taken from a title page substitute
- Nonprint integrating resources:
  - Follow the instructions in subrule .7B3 in the chapter dealing with the type of material to which the resource belongs

- For remote electronic resources: 9.1B2 & 9.7B3:
  - <u>Always</u> give source of title proper in a note
    - Examples given in 9.7B3 and 12.7B3 include:
      - Title from title screen
      - Title from home page (viewed on Dec. 18, 1999)
        (*Source of title proper note combined with item described note*)

11

Bibliographic history and relationships note: 12.7B8

- Make notes on the **bibliographic history** and on the **important relationships** between the resource being described and the immediately **preceding**, immediately **succeeding**, or **simultaneously issued** resources.
  - *These include:*
    - Continuations
    - Mergers
    - Splits
    - Absorptions
    - Translations
    - Simultaneous editions
    - Supplements

- LC/PCC practice: give **reciprocal linking notes**
  - Use MARC 76X-78X linking entry fields and 580 linking entry complexity note when appropriate

| Detailed coverage of linking notes later in Session 2 |

12

Item described note: 12.7B23

- If the description is not based on the first iteration:
  - Make a note of the latest iteration consulted in making the description
    - Description based on: 1994 ed. through update 10

- For remote access resources:
  - <u>Always</u> give the date on which the resource was viewed for description (see also 9.7B22)
    - Description based on contents viewed on Oct. 21, 1999
    - Title from title bar (viewed on Jan. 13, 2000)
      (*Source of title proper note combined with item described note*)

13

Item described note

ANGLO-AMERICAN
CATALOGUING
RULES
Second Edition
2002 Revision

The NAB Guide
to Endangered Species

245 00 Anglo-American cataloguing rules

No note given because resource is not electronic and description is based on first iteration

Update no. 16
July 2002

245 04 The NAB guide to endangered species.

250   4th ed.

500   Description based on: update no. 16, published July, 2002.

CANADIAN LIBRARY ASSOCIATION / Ottawa
CHARTERED INSTITUTE OF LIBRARY AND INF
AMERICAN LIBRARY ASSOCIATION / Chicago

Combined source of title proper and item described notes example

USDA NUTRIENT DATA LABORATORY — Agricultural Research Service

USDA National Nutrient Database for Standard Reference
Release 15

This page provides access to Release 15 of the USDA National Nutrient Database for Standard Reference. You can either view the data here or download the data files and documentation in several different formats for use later on your computer. A search tool is also provided so you can look up the nutrient content of 6220 different foods directly from this home page.

```
245 00 USDA national nutrient database for standard reference $h
[electronic resource].

500    Title from home page (viewed on Dec. 15, 2002).
```

Area 8: Standard number and terms of availability: 12.8

- Record standard numbers
- Standard Number (12.8B1)
  - ISBN: 020
  - ISSN: 022
- LCRI 12.8B1: If an integrating resource has both, give both in the catalog record.

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Access Points:
Main and added entries

Determine name and uniform title entries

- Based on AACR2 chapter 21
  - Persons and bodies that bear responsibility for the intellectual or artistic content of the resource
  - Uniform titles for resources dealing with works of literature, music, etc.

- Enter in MARC 1XX and 7XX fields
  - In full-level records, 7XX entries must be explained ("justified") by being given in the descriptive part of the record (MARC 2XX-5XX)

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Corporate body main entry example


```
110 2_ Program for Cooperative Cataloging.

245 10 Program for Cooperative Cataloging $h [electronic resource] :
       $b [website].
```

Title main entry example

```
245 00 Smithsonian Institution $h [electronic resource] :
       $b [website].

710 2_ Smithsonian Institution.
```

Electronic location and access

- MARC 856 field
  - Indicators:
    - First indicator = access method
    - Second indicator = relationship
  - Most commonly used subfields:
    - Subfield $u = uniform resource identifier (URI)
      - suffices for most Web resources
    - Subfield $z = public note
    - Subfield $3 = materials specified note

- Serves as active hyperlink from the catalog record to the online resource in Web-based catalogs

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856 indicators

- Indicator 1: Access method
  - 0 = E-mail
  - 1 = FTP
  - 2 = Remote login (Telnet)
  - 3 = Dial-up
  - **4 = HTTP**
    - *Used for most Web resources*
  - 7 = Method specified in $2
    - *Used in records for Web resources before 1997*

- Indicator 2: Relationship
  - *Can generate display constant*
  - Blank = No info. provided
  - **0 = Resource**
    - *Used in records for Web resources themselves*
  - 1 = Version of resource
  - 2 = Related resource
  - 8 = No display constant generated

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856 Examples

```
245 10 Program for Cooperative Cataloging $h [electronic resource]
       : $b [website].
856 40 $u http://lcweb.loc.gov/catdir/pcc/
```

```
245 00 Charta $h [electronic resource] : $b scegli charta e il
       biglietto tuo.
546    In Italian; includes English version.
856 40 $u http://www.charta.it/
856 40 $3 English version $u http://www.charta.it/english/index.php
```

```
245 00 OCLC firstsearch $h [electronic resource].
856 40 $u http://www.ref.oclc.org:2000 $z Requires authorization
   and password
```

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URL in 856 must match granular level of description

http://www.un.org/
= URL for whole Web site

http://www.un.org/english/
= URL for English language portion of Web site

URL in 856 40 must match granular level of resource you are selecting for description in the body of the bibliographic record.

Internal bookmarks in 856 URLs must also match
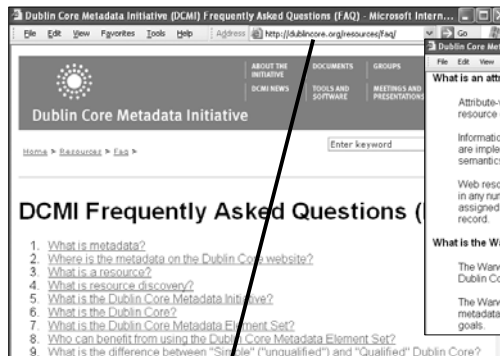
http://dublincore.org/resources/faq/
= URL for whole FAQ document
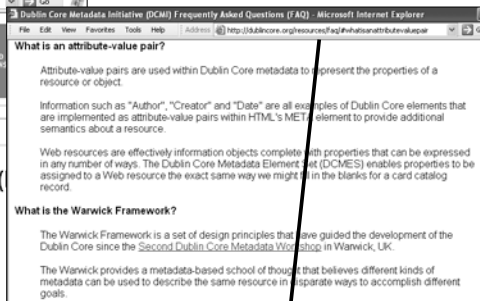
http://dublincore.org/resources/faq/#what isanattributevaluepair
= URL for bookmarked sub-section of FAQ

856 40 $u http://dublincore.org/resources/**faq/**

URL in 856 40 must match the level of a Web resource selected for cataloging; must not contain an internal "bookmark" to a sub-section within a page **unless** that is the specific section being cataloged. HTML bookmarks are indicated by the "#" sign.

Beyond AACR2:
Subject headings and classification

- Do the same thing as for non-integrating resources, but keep in mind the changing content
  - **Analyze the subject content** of the resource at the selected granular level
  - **Assign subject headings** from a standard scheme
    - LCSH, MeSH, etc.
  - May also assign a **classification number** from a standard scheme
    - LCC, DDC, etc.
    - Class portion alone may suffice in master records

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Relationships with other resources and Links between records

- 12.7B8: Bibliographic history and relationships note
  - Make notes on the **bibliographic history** and on the **important relationships** between the resource being described and **immediately preceding, immediately succeeding, or simultaneously issued resources**
    - *These include:*
      - Continuations
      - Mergers
      - Splits
      - Absorptions
      - Translations
      - Simultaneous editions
      - Supplements
- LC/PCC practice: give reciprocal linking notes
  - Use MARC 76X-78X linking entry fields and 580 linking entry complexity note when appropriate

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Reciprocal links between records

- Relationships are generally expressed by reciprocal linking notes on both records
  - Rather than by a related-work added entry for the earlier resource on the record for the later resource:

| Integrating resource | ⬌ | Integrating resource |

| Integrating resource | ⬌ | Serial |

| Integrating resource | ⬌ | Monograph |
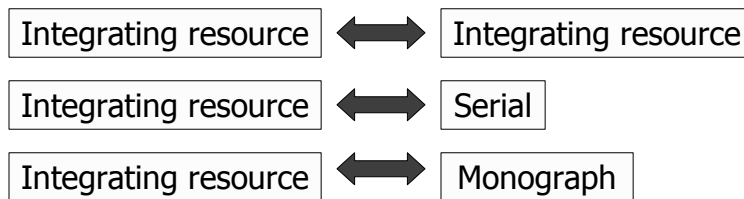
But not: Monograph ←→ Monograph

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What linking fields do and don't do

- 1. Links generate notes
  - In an online record: 780 00 $t Performance practice review $w … generates the note:
    - `Continues: Performance practice review.`

- 2. Links connect related records in a database

- 3. Links are not intended to provide added entries

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Chronological relationships

- Relationships in time between resources (sequential relationships)
  - May be **simple** (e.g., one-to-one relations such as: continues/ continued by) or **complex** (more than one-to-one relations, such as: mergers, splits, absorptions)
  - Most commonly in IR records: **when a publication issued over time changes from one format to another**; or for successive editions of an updating loose-leaf with in toto replacement
    - A new catalog record is required for the publication in the new format, etc.
- Examples:
  - A print serial continued by an online database
  - Two print serials and a loose-leaf service cease and merge into a single online Web site
  - A loose-leaf issued in a new edition, with in toto replacement of the base volume
  - An online database separated from a print serial

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Horizontal relationships

- Relationships between different versions of the same resource
  - May be issued **simultaneously** (language editions) or at **different times** (reprints or translations); also include **supplements** and **reproductions**
  - Most commonly in IR records: when a publication appears in **a different format, a different language, or as a reproduction**

- Examples:
  - A print serial also issued as an online database
  - Four map serials also issued as a combined online GIS database
  - A CD-ROM serial also issued as an online database

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Common MARC 21 linking fields

- **Linking fields**
  - 765 Original language entry
  - 767 Translation entry
  - 775 Other edition entry
  - 776 Additional physical form entry
  - 780 Preceding entry
  - 785 Succeeding entry
  - 787 Nonspecific relationship entry
- **Note fields**
  - 530 Additional physical form available note
  - 580 Linking entry complexity note
    - used when appropriate note cannot be generated using a linking field alone

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Components of linking entry fields

- **1. Catalog entry**: $a, $b, $t, $s
  - Enter the catalog entry from the MARC 130 and/or 1XX, 240, and 245 fields of the related record into the $a, $t, and occasionally $b and $s of the linking field in the record being edited

- **2. Standard numbers**: $x, $z
  - Whenever it is available on a related record, include the **ISSN** in $x and/or the **ISBN** in $z in the link

- **3. Control numbers**: $w
  - Include a $w for the **LC** and/or **NLC** record number, if one exists
  - Include also a $w for a utility (e.g., OCLC) record number if cataloging in one of the utilities and/or if there is no LC or NLC record number

- **See LCRI 12.7B8** for more information and exceptions

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Linking fields: Indicators (1)

- First indicator
  - 0 Display note (usually)
  - 1 Do not display note (only when 580 used)

- Second indicator
  - Varies depending on field, used to determine display constant in OPAC
  - 776   0_   Available in another form:
  - 787   0_   Related item:

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Linking fields: Indicators (2)

- Second indicator for 780 (Preceding entry)
  - 0 Continues
  - 1 Continues in part
  - 2 Supersedes [Pre-AACR2]
  - 3 Supersedes in part [Pre-AACR2]
  - 4 Formed by the union of ... and ...   ← requires 580 note
  - 5 Absorbed
  - 6 Absorbed in part
  - 7 Separated from

34

Linking fields: Indicators (3)

- Second indicator for 785 (Succeeding entry)
  - 0 Continued by
  - 1 Continued in part by
  - 2 Superseded by [Pre-AACR2]
  - 3 Superseded in part by [Pre-AACR2]
  - 4 Absorbed by
  - 5 Absorbed in part by
  - 6 Split into ... and ...
  - 7 Merged with ... to form ...   Usually need 580 note
  - 8 Changed back to [Pre-AACR2]

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Linking fields: Subfields (1)

$a Main entry heading

- From related record's 100, 110, 111
- Individual components of the name heading are included in a single subfield $a

$s Uniform title

- From related record's 240
- Only used in conjunction with $a
- Individual components of a uniform title are included in a single subfield $s

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Linking fields: Subfields (2)

$t Title

- From related record's 130 or 245 $a $n $p
- Individual components of a title are included in a single subfield $t

$b Edition

- From related record's 250
- Include only if 1XX/245 are the same in both records (i.e., needed to distinguish)

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Linking fields: Subfields (3)

$w Control number

- **LCCN** from related record's 010 field
  - Precede LCCN by "(DLC)" and formulate LCCN using proper spacing conventions
    - Post-2000 LCCN format: $w (DLC)__2002123456
    - Pre-2001 LCCN format: $w (DLC)___98345678_
    - [Must have 12 positions: 2 initial blanks in post-2000 numbers; 3 initial + 1 final blank in pre-2001 numbers]
- In OCLC database, also include: **OCLC record number** from related record
  - Precede by (OCoLC) without spaces: $w (OCoLC)1758471
- Example with both LCCN and OCLC numbers in $w:
  - $w (DLC)__2002003771 $w (OCoLC)4471176

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Linking fields: Subfields (4)

$x ISSN

- from related record's 022 field (serials, possibly some integrating resources)

$z ISBN

- from related record's 020 field

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Linking fields: Subfield Conventions

- Punctuation:
  - Ending punctuation only in $a and in $s (and $t if followed by $b)

- Initial articles:
  - Omit unless intent is to file on (e.g., Los Angeles)

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Form of Linking Entry

Title proper, and if needed, edition	245	$t
	245/250	$t $b
Main entry name heading/title proper, and if needed, edition	1XX/245	$a $t
	1XX/245/250	$a $t $b
Main entry name heading/uniform title	1XX/240	$a $s
Main entry name heading/uniform title/title proper (legal, translations)	1XX/240/245	$a $s $t
Main entry uniform title	130	$t
Main entry uniform title/title proper (translations and other language editions)	130/245	$t

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Reciprocal Linking Notes

- Linking entry complexity note – 580
  - Use only if the relationship between two or more bibliographic resources is too complex to be expressed by the second indicator of the linking field or when the cataloger wants to give additional information.

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Example 1: New ed. of updating loose-leaf related to previous ed.

Record for current edition:

```
OCLC record # 50440733
010    2002-71009
020    084441073X (loose-leaf)
245 00 CONSER cataloging manual / $c Jean L. Hirons, editor.
250    2002 ed.
780 00 $t CONSER cataloging manual. $b 1st ed. $z 0844407844
  $w (DLC)___93009913_$w (OCoLC)27813639
```

Record for previous edition:

```
OCLC record # 27813639
010 93-9913
020 0844407844
245 00 CONSER cataloging manual / $c Jean L. Hirons, editor.
785 00 $t CONSER cataloging manual. $b 2002 ed. $z 084441073X
  $w (DLC)__2002071009 $w (OCoLC)50440733
```

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Example 2: Merger of two loose-leaf resources into one new resource

Record for current resource:

```
010    2002111111
022    1234-5678
245 00 Regulations for commercial and residential property.
580    Merger of: Regulations for commercial property, and:
  Regulations for residential property
780 14 $t Regulations for commercial property $z 1212343456
  $w (DLC)___95012012_
780 14 $t Regulations for residential property $z
  0101252252 $w (DLC)___96214789_
```

Reciprocal links are given in each of the records for the two preceding resources.

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Option: generate notes from links

Option 1: use 530 note:

```
245 00 Environmental knowledgebase $h [electronic resource].
530    Also available in a CD-ROM version as: Environmental
   periodicals bibliography.
776 1  $t Environmental periodicals bibliography (CD-ROM) $x
   1053-1440 $w (DLC)sn_90003252_$w (OCoLC)22461337
```

Option 2: use $i in 7xx link:

```
245 00 Environmental knowledgebase $h [electronic resource].
776 08 $i Also available in a CD-ROM version as: $t
   Environmental periodicals bibliography (CD-ROM) $x 1053-
   1440 $w (DLC)sn_90003252_$w (OCoLC)22461337
```

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Example 3: Online database (IR) related to CD-ROM version (serial)

Record for online database:

```
008     Type: a  BLvl: i    SrTp: d    S/L: 2
006     Type: m  Audn:   File: e    GPub:
245 00 Environmental knowledgebase $h [electronic resource].
538    Mode of access: World Wide Web.
776 08  $i Also available in a CD-ROM version as: $t
   Environmental periodicals bibliography (CD-ROM) $x 1053-
   1440 $w (DLC)sn_90003252_$w (OCoLC)22461337
```

Record for CD-ROM serial:

```
008    Type: a   BLvl: s
130 0  Environmental periodicals bibliography (CD-ROM)
245 00 Environmental periodicals bibliography $h [electronic
   resource].
300    computer optical discs ; $c 4 3/4 in.
776 08 $i Beginning 1998 available also as an online database: $t
   Environmental knowledgebase $w (OCoLC)41106254
```

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Example 4: Web site (IR) related to earlier print serial title [1]

Record for Web site:

```
008     Type: a  BLvl: i  SrTp: w   S/L:  2
006     Type: m  Audn:   File: d   GPub:
245 00 Performance practice encyclopedia $h [electronic
   resource] / $c editor, Roland Jackson.
538     Mode of access: World Wide Web.
580     A continuation of the print journal: Performance
   practice review.
780 10 $t Performance practice review $x 1044-1638 $w
   (DLC)___89645461_$w (OCoLC)18712767
856 40 $u http://www.performancepractice.com/
```

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Example 4: Web site (IR) related to earlier print serial title [2]

Record for print serial:

```
008     Type: a    BLvl: s
245 00 Performance practice review.
300    10 v. : $b ill. ; $c 23 cm.
362 0  Vol. 1, no. 1, 2 (spring, fall 1988)-v. 10, no. 2
   (fall 1997).
580     Continued by an online database called: Performance
   practice encyclopedia.
785 10 $t Performance practice encyclopedia $w(OCoLC)40223351
```

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Example 5: Online database related to simultaneously-issued CD-ROM serial <u>and</u> to earlier updating loose-leaf [1]

Record for online database:

```
008      Type: a    BLvl: i  SrTp: d  S/L: 2
006      Type: m    Audn:    File: d   GPub: f
245 00 USDA national nutrient database for standard reference $h
   [electronic resource].
246 1_ $i Title in HTML header: $a USDA nutrient database for
   standard reference
538      Mode of access: World Wide Web.
580      Previously issued as a print loose-leaf: Consumer and
   Food Economics Institute (U.S.). Composition of foods.
776 08  $i Issued also in a CD-ROM version: $t USDA nutrient
   database for standard reference $w (DLC)___00252195_$w
   (OCoLC)43564113
780 10 Consumer and Food Economics Institute (U.S.). $t
   Composition of foods $w (DLC)___77602784_$w (OCoLC)3913709
856 40 $u
   http://www.nal.usda.gov/fnic/foodcomp/Data/SR15/sr15.html
```
                                                              49

Example 5: Online database related to simultaneously-issued CD-ROM serial <u>and</u> to earlier updating loose-leaf [2]

Record for CD-ROM serial:

```
008      Type: a    BLvl: s
245 00   USDA nutrient database for standard reference
   $h [electronic resource].
300      computer optical discs ; $c 4 3/4 in.
580      Previously issued as a print loose-leaf:
   Consumer and Food Economics Institute (U.S.).
   Composition of foods.
776 08  $i Issued also as an online database: $t USDA
   national nutrient database for standard reference $w
   (OCoLC)44340484
780 10  Consumer and Food Economics Institute (U.S.).
   $t Composition of foods $w (DLC)___77602784_$w
   (OCoLC)3913709
856 41  $u http://www.nal.usda.gov/fnic/foodcomp/
```
                                                              50

Example 5: Online database related to simultaneously-issued CD-ROM serial <u>and</u> to earlier updating loose-leaf [3]

Record for print loose-leaf:

```
008      Type: a    BLvl: i    SrTp: l    S/L: 2
110 2    Consumer and Food Economics Institute (U.S.)
245 10   Composition of foods : $b raw, processed,
  prepared / $c by Consumer and Food Economics Institute.
300      v. (loose-leaf) ; $c 28 cm.
580      Continued by a publication issued on CD-ROM: USDA
  nutrient database for standard reference, and online
  via World Wide Web: USDA national nutrient database for
  standard reference.
785 10   $t USDA nutrient database for standard reference
  $w (DLC)___00252195_$w (OCoLC)43564113
785 10   $t USDA national nutrient database for standard
  reference $w (OCoLC)44340484
```

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Final records for three examples

(1) PCC Web Site

(2) USDA National Nutrient Database

(3) AACR2 Loose-Leaf

Final Record for PCC Web Site (1)

```
Type: a     ELvl: I    Srce: d    GPub: f    Ctrl:      Lang: eng
BLvl: i     Form: s    Conf: 0    Freq:      MRec:      Ctry: dcu
S/L: 2      Orig: s    EntW:      Regl: x    Alph:
Desc: a     SrTp: w    Cont:      DtSt: c    Dates: 199u,9999


006    m d f
007    c $b r $d m $e n
041 0_ eng $a spa
090    Z693.3.C66 $b P76
110 2_ Program for Cooperative Cataloging.
245 10 Program for Cooperative Cataloging $h [electronic
       resource] : $b [website].
246 1  $i Commonly known as: $a PCC
260    [Washington, D.C.] : $b Library of Congress
362 1_ Began in 1990s.
```

Final Record for PCC Web Site (2)

```
538    Mode of access: World Wide Web.
546    Chiefly English, but some information also
       available in Spanish.
500    Title from home page (viewed on Dec. 2, 2002).
520    Contains information about the Program for Cooperative
       Cataloging, including its governance, organization,
       strategic plans, online statistics, and archived
       reports from various PCC groups and meetings. Features
       links to the home pages of the PCC's component
       programs: BIBCO, CONSER, NACO, and SACO.
610 20 Program for Cooperative Cataloging.
650 _0 Cataloging, Cooperative.
710 2_ Library of Congress.
856 40 $u http://lcweb.loc.gov/catdir/pcc/
```

Final Record for Nutrient Database (1)

```
Type: a    ELvl: I    Srce: d    GPub: f    Ctrl:       Lang: eng
BLvl: i    Form: s    Conf: 0    Freq:      MRec:       Ctry: mdu
S/L: 2     Orig: s    EntW:      Regl: x    Alph:
Desc: a    SrTp: d    Cont:      DtSt: c    Dates: 199u,9999
```

```
006    m d f
007    c $b r $d m $e n
245 00 USDA national nutrient database for standard
       reference $h [electronic resource].
246 1_ $i Title in HTML header: $a USDA nutrient database
       for standard reference
260    Beltsville, MD : $b USDA Nutrient Data Laboratory,
       Agricultural Research Service
362 1  Began in 1990s.
538    Mode of access: World Wide Web.
516    Searchable database.
500    Title from home page (viewed Dec. 15, 2002).
```

Final Record for Nutrient Database (2)

```
520     Offers access to food descriptions, food group data,
    nutrient information, and a nutrient definition file.
    Contains a weight file, source code information, and a
    description of measures used. Posts contact information
    for the Nutrient Data Laboratory via street address,
    telephone and fax numbers, and e-mail.
580     Previously issued as a print loose-leaf: Consumer
    and Food Economics Institute (U.S.). Composition of
    foods.
650 _0 Food $x Composition $v Databases.
710 2_ Nutrient Data Laboratory (U.S.)
776 08 $i Also available on CD-ROM: $t USDA nutrient
    database for standard reference $w (DLC)___00252195_$w
    (OCoLC)43564113
780 10 Consumer and Food Economics Institute (U.S.). $t
    Composition of foods $w (DLC)___77602784_$w
    (OCoLC)3913709
856 40 $u http://www.nal.usda.gov/fnic/foodcomp/Data/SR15/sr15.html
```

Final Record for AACR2 Loose-leaf (1)

```
Type: a    ELvl: I    Srce: d    GPub:       Ctrl:       Lang: eng
BLvl: i    Form:      Conf: 0    Freq: a     MRec:       Ctry: onc
S/L: 2     Orig:      EntW:      Regl: r     Alph:
Desc: a    SrTp: l    Cont: b    DtSt: c     Dates: 2002,9999


020    083893529X (loose-leaf with binder)
020    0838935303 (loose-leaf without binder)
050 00 Z694.15.A56 $b A53 2002
082 00 025.3/2 $2 21
245 00 Anglo-American cataloguing rules / $c prepared
   under the direction of the Joint Steering Committee
   for Revision of AACR, a committee of the American
   Library Association ... [et al.].
```

Final Record for AACR2 Loose-leaf (2)

```
245 00 Anglo-American cataloguing rules / $c prepared under
    the direction of the Joint Steering Committee for
    Revision of AACR, a committee of the American Library
    Association ... [et al.].
246 1_ $i Commonly known as: $a AACR2
250    2nd ed., 2002 revision.
260    Ottawa : $b Canadian Library Association ; $a
    Chicago : $b American Library Association, $c 2002-
300    v. (loose-leaf) ; $c 30 cm.
310    Updated annually
504    Includes bibliographical references and index.
650 _0 Descriptive cataloging $v Rules.
650 _2 Cataloging $v standards.
710 2_ Joint Steering Committee for Revision of AACR.
710 2_ American Library Association.
780 00 $t Anglo-American cataloguing rules. $b 2nd ed.,
    1998 revision $w (DLC)___98008479_$w (OCoLC)39281762
```

Session 2: Exercises

- Create an original record for each of two online integrating resources based on the screen shots of the home page and other selected pages on the following slides.

- Concentrate on descriptive cataloging and include subject headings and classification numbers only if you have time and are so inclined.

- There are also optional exercises for supplying the "interim" 008 and 006 coding for these two records for systems that have not yet implemented Bibliographic level code "i." Note: the interim method is no longer being used by PCC or OCLC member libraries.

- Optionally, also complete the three exercises for printed loose-leafs as directed.

- Use Appendix B for MARC tagging information. It's a kind of one-stop-shop containing all the MARC coding documentation you should need to complete the workshop exercises.

- Use the Session 2 Exercise Workforms.

- Fill in the original cataloging workforms for Exercises 1 and 2.

Exercise 1
  Home page:
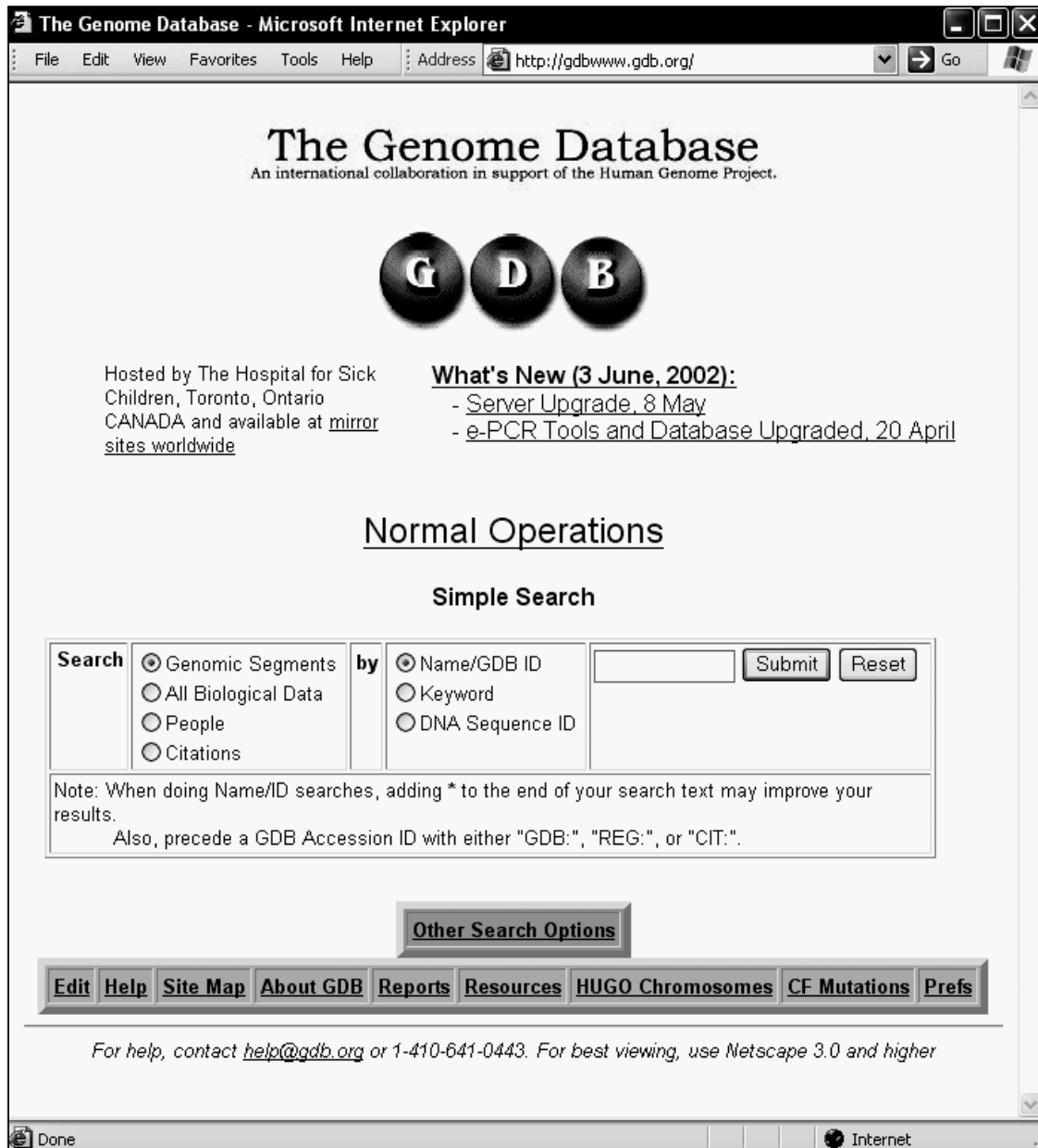
Things to notice on this page:
- HTML header title displayed in browser title bar
- URL displayed in browser Address window
- Title display at top of home page [is a graphic rather than HTML text] and includes possible subtitle
- GDB logo graphic displayed below that
- You are seeing the bottom of the home page; there is no publisher or date information present there

- The database is searchable by a variety of searches, but does not appear to be heavily "interactive" and computer-program based; it appears to consist of basically textual records.

When you click on the "About GDB" link from the home page you are taken to this "About" page.

Things to notice on this page:
- Links to a Mission statement, "What you will find in the Genome database," etc., bookmarked on this page.
- The beginning of the Mission Statement appears in the lower part of the screen shot
- This gives information on the 'ownership' of the database and clues as to who may be taken as the publisher

This is the bottom of the About page.

Right to Use

The Hospital for Sick Children and Johns Hopkins University, which own certain rights in the Genome Database, grant a non-exclusive license to the scientific community for non-commercial uses of GDB.

Disclaimer

The Hospital for Sick Children and Johns Hopkins University make no warranty (express, implied, or statutory) regarding GDB or any data stored within it, including without limitation implied warranties of merchantability, fitness for use, or fitness for a particular purpose.

Personal contact information for people with GDB editing accounts and other individuals in the genome research community is publicly available through GDB.

Funding

GDB is an international project supported through private donations .

GDB is a trademark of The Johns Hopkins University.

*For more information, help@gdb.org or 1-416-813-8744. For best viewing, use Netscape 3.0 or higher
Last updated Fri August 27, 1999*

● Internet

Things to notice on this part of the page:
- More leads on who to regard as the online publisher of the database.
- Note that the "Last updated" date can only be taken as applying to this About page and not to the database as a whole.

Clicking on the 'Contact information' link from another sub-page takes you to this page.

Things to notice on this page:
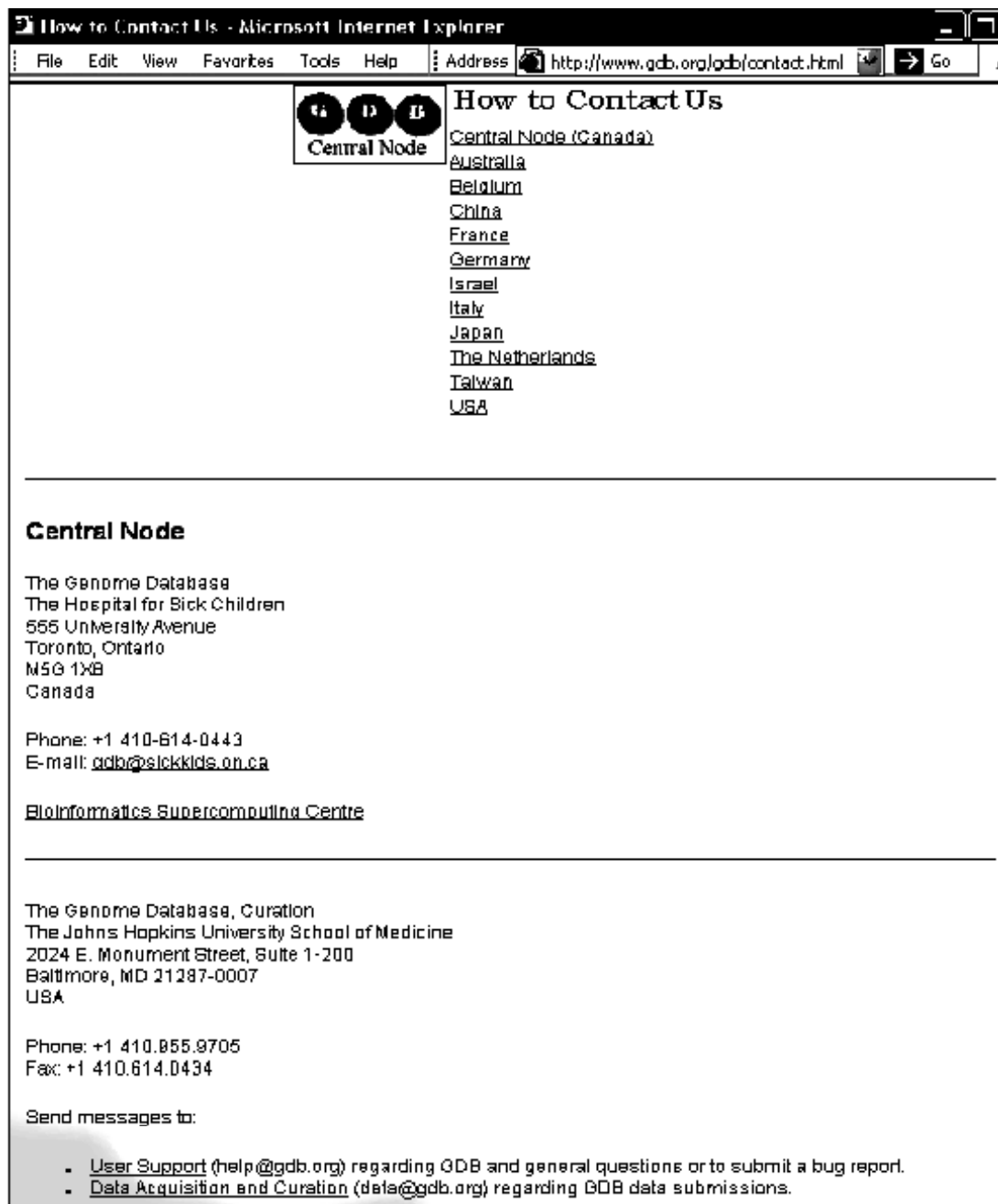- Further confirmation on the online publishers of the database and their locations
- Note that the database has many "nodes" housed in many different countries, but that the central node is at The Hospital for Sick Children in Toronto; this and previous screens have shown us that the database was established at, and continues to be curated by, Johns Hopkins University School of Medicine in Baltimore. The Bioinformatics Supercomputing Centre at the Hospital for Sick

Children houses or hosts the database. The names of these two institutions are mentioned together throughout the pages we have seen.

Clicking on Archives of What's New takes you to this page.
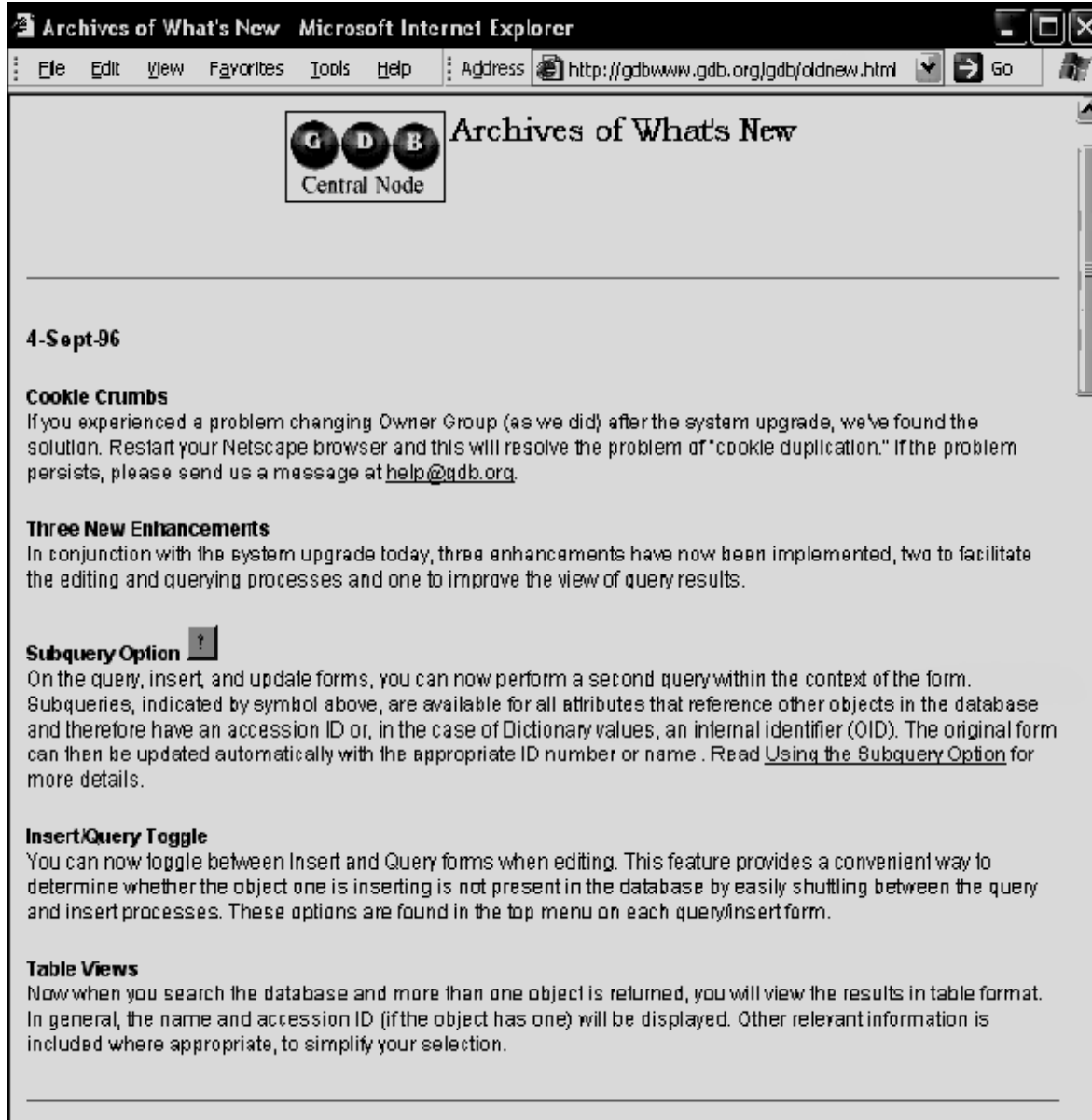
Things to notice on this page:
- The earliest entry is for Sept. 4, 1996.
- This may provide an indication of when the database first went online, and be taken as an approximate beginning date of publication.
- But nothing so far has stated definitively when the database first went online.

This is a sample database entry.

Things to notice on this page:
* The entries or records in the database consist basically of text that is not highly computer-manipulable or interactive such that it would be best regarded as computer file material rather than text or language material content.

Exercise 2: Updating Web Site

From a source external to the Web site itself you know that the site began on the Web in 1995.

Home page:

Things to notice on this page:
- The forms of title displayed on the home page and in the title bar (HTML header source).
- The potentially interactive, computer program-based nature of the Web site.

- Clues as to the publisher of the Web site, with two level of government
  institution being given – potentially as both title and publisher information

Hold cursor over an area of the map to get information.
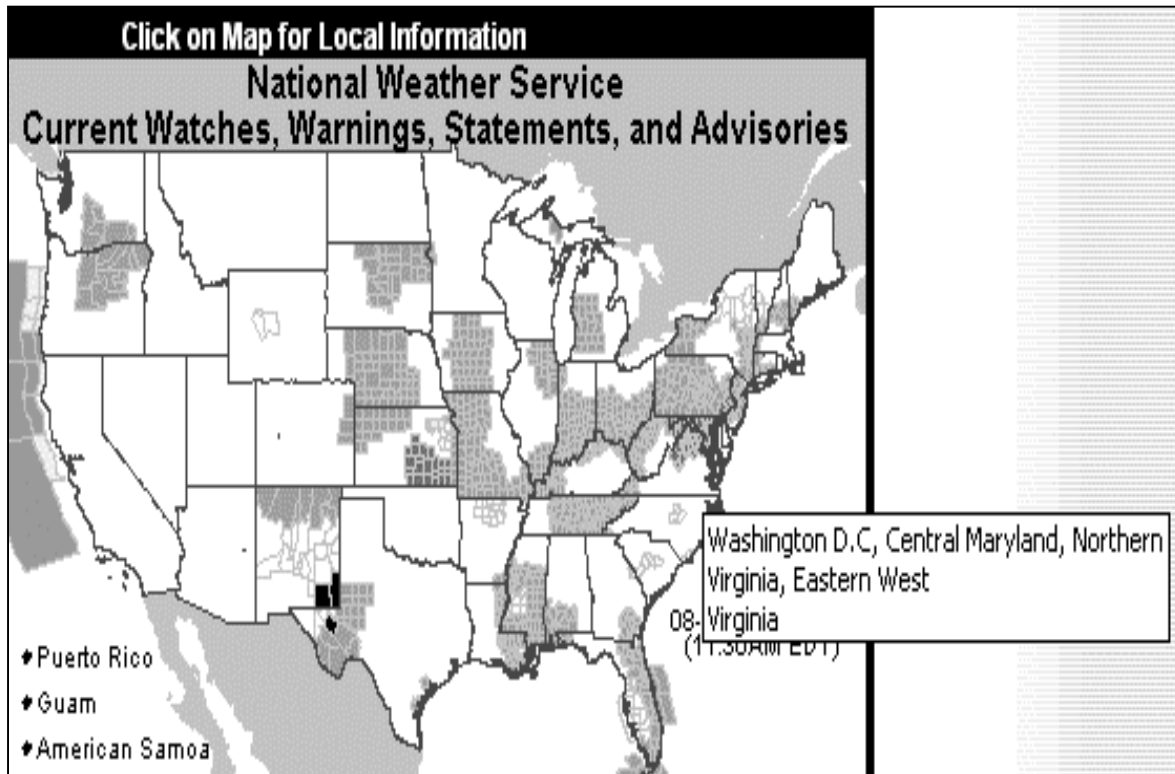
Things to notice on this page:

- Some level of interactivity by clicking on a map to get current watches,
  warnings, advisories, etc.
- Content is being updated continuously and actively, does not consist of just
  'static' textual data, but also seems to involve active computer programs to
  retrieve and update that data in a dynamic, computer-based way

When Washington DC has been selected form the previous screen, you get to this page.

Things to notice on this page:
- More clickable image maps, radar and satellite images that must be updated frequently every day, almost certainly by computer

Exercises 3 and 4: Optional but recommended for those whose local systems have not yet implemented Bibliographic Level code "i":

Supply the "interim" fixed element coding for the Exercise 1 Database and Exercise 2 Web site in the partial workforms provided for Exercises 3 and 4 in the Unit 2 Exercises Workforms Word document.

Exercise 5 (Optional): Loose-leaf publication

Record (selected fields), as created prior to AACR2 2002 Revision:

Type: a	ELvl: I	Srce: d	Audn:	Ctrl:	Lang: eng
BLvl: m	Form:	Conf: 0	Biog:	MRec:	Ctry: dcu
	Cont:	GPub: f	LitF: 0	Indx: 1	
Desc: a	Ills: a	Fest: 0	DtSt: m	Dates: 2002,9999	

245 00 Freedom of information handbook.
260   Washington, D.C. : $b U.S. Dept. of the Interior, Office of the Secretary, $c 2002-
300   1 v. (loose-leaf) : $b ill. ; $c 28 cm.

Using the partial workform (selected fields only) provided in the Unit 2 Exercises Workforms Word document, re-catalog this title according to new rules in the AACR2 2002 Revision.   The resource is updated quarterly; at the time of cataloging, you have the first iteration, dated 2002.

Exercise 6 (Optional): Loose-leaf publication

Existing record in database (selected fields only):

Type: a	ELvl: I	Srce: d	Audn:	Ctrl:	Lang: eng
BLvl: m	Form:	Conf: 0	Biog:	MRec:	Ctry: nyu
	Cont:	GPub: f	LitF: 0	Indx: 1	
Desc: a	Ills: a	Fest: 0	DtSt: m	Dates: 1995,9999	

245 04   The NAB guide to currently endangered species.
260   New York, N.Y. : $b National Audubon Society, $c [1995?]-
300   2 v. (loose-leaf) : $b ill. ; $c 22 cm.

Using the workform provided, re-catalog this title according to new rules in the AACR2 2002 Revision.   The resource is updated irregularly with no known pattern. The first iteration was not available at time of cataloging; you have Update no. 16, issued in July 2002.

Exercise 7 (Optional): Loose-leaf publication

In November 2001 you receive the first iteration of a new loose-leaf publication which you will originally catalog (there is no existing record in the database). The resource states that it will be updated annually, but it has no date printed anywhere. How do you handle date information in your new original record? Use the partial workform provided in the Workforms Word document.

245 00   Directory of digital geospatial metadata clearinghouses.

260   Washington, D.C. : $b Federal Geospatial Data Committee

310   Updated annually

362 1

- *Fill in the cataloging workforms according to the exercise instructions.*

Exercise 1: Database

Type:	ELvl: I	Srce: d	GPub:	Ctrl:	Lang:
BLvl:	Form:	Conf:	Freq:	MRec:	Ctry:
S/L:	Orig:	EntW:	Regl:	Alph:	
Desc: a	SrTp:	Cont:	DtSt:	Dates: ,	

006 for Computer Files/Electronic Resources

Audn:	File:	GPub:

007		$a $b $d $e $f
1		
245		
246		
24		
24		
256		
260		
310		
3		
362	1	
4		
538		
5		
5		
5		
6		0
6		0
7		
7		
7		
8		
856		

Exercise 2: Web site
[note: select one or the other set of fixed length elements depending on your choice for Type code]

Type:	ELvl: I	Srce: d	Audn:	Ctrl:	Lang:
BLvl:	File:	GPub:		MRec:	Ctry:
Desc: a			DtSt:	Dates: ,	

+ 006 for Continuing Resources:

Freq:	Regl:	ISSN:	SrTp:	Orig:	Form:
EntW:	Cont:	Pub:	Conf:	Alph:	S/L:

OR:

Type:	ELvl: I	Srce: d	GPub:	Ctrl:	Lang:
BLvl:	Form:	Conf:	Freq:	MRec:	Ctry:
S/L:	Orig:	EntW:	Regl:	Alph:	
Desc: a	SrTp:	Cont:	DtSt:	Dates: ,	

+ 006 for Computer Files/Electronic Resources:

Audn:	File:	GPub:

007		$a $b $d $e $f
1		
245		
246		
24		
24		
256		
260		
310		
3		
362	1	
4		
538		
5		
5		
5		
6		0
6		0
7		

7		
8		
856		

Optional Additional Exercises for those whose local systems have not yet implemented Bibliographic Level code "i":

Exercise 3: Supply the "interim" fixed element coding for the Exercise 1: Database

Type:	ELvl: I	Srce: d	Audn:	Ctrl:	Lang:
BLvl:	Form:	Conf:	Biog:	MRec:	Ctry:
		Cont:	GPub:	LitF:	Indx:
Desc: a	Ills:	Fest:	DtSt:	Dates: ,	

+ 006 for Computer Files/Electronic Resources:

Audn:	File:	GPub:

+ 006 for Continuing Resources:

Freq:	Regl:	ISSN:	SrTp:	Orig:	Form:
EntW:	Cont:	Pub:	Conf:	Alph:	S/L:

Exercise 4: Supply the "interim" fixed element coding for the Exercise 2: Web site

Type:	ELvl: I	Srce: d	Audn:	Ctrl:	Lang:
BLvl:	Form:	Conf:	Biog:	MRec:	Ctry:
		Cont:	GPub:	LitF:	Indx:
Desc: a	Ills:	Fest:	DtSt:	Dates: ,	

+ 006 for Computer Files/Electronic Resources:

Audn:	File:	GPub:

+ 006 for Continuing Resources:

Freq:	Regl:	ISSN:	SrTp:	Orig:	Form:
EntW:	Cont:	Pub:	Conf:	Alph:	S/L:

==*OR:*==

Type:	ELvl: I	Srce: d	Audn:	Ctrl:	Lang:
BLvl:	File:	GPub:		MRec:	Ctry:
Desc: a			DtSt:	Dates: ,	

+ 006 for Continuing Resources:

Freq:	Regl:	ISSN:	SrTp:	Orig:	Form:
EntW:	Cont:	Pub:	Conf:	Alph:	S/L:

Optional Additional Loose-leaf Exercises:

Exercise 5: Loose-leaf

Type:	ELvl: I	Srce: d	GPub:	Ctrl:	Lang:
BLvl:	Form:	Conf:	Freq:	MRec:	Ctry:
S/L:	Orig:	EntW:	Regl:	Alph:	
Desc: a	SrTp:	Cont:	DtSt:	Dates: ,	

245	00	Freedom of information handbook.
260		
300		
310		

Exercise 6: Loose-leaf

Type:	ELvl: I	Srce: d	Audn:	Ctrl:	Lang:
BLvl:	Form:	Conf:	Biog:	MRec:	Ctry:
		Cont:	GPub:	LitF:	Indx:
Desc: a	Ills:	Fest:	DtSt:	Dates: ,	

245	04	The NAB guide to currently endangered species.
260		
300		
310		
362	1	
500		

Exercise 7: Loose-leaf

245	00	Directory of digital geospatial metadata clearinghouses.
260		Washington, D.C. : $b Federal Geospatial Data Committee
310		Updated annually
362	1	

Session 3 Updating Integrating Resource Records for Changes in Bibliographic Data

Session 3

Updating IR Records
for Changes in Bibliographic
Elements

Goals for Session 3

1. Learn how to update existing records when data elements have changed

2. Understand how to apply AACR2 chapter 12 rules and MARC coding for integrating entry cataloging

2

Changes can occur in any area of description or access points

- Title proper
- Parallel or other title information
- Statement of responsibility
- Edition
- Type and extent of resource [area no longer given]
- Places of publication or publisher names
- Series
- Standard number
- Notes (frequency, responsibility, summary)
- Choice of main and added entries
- Choice of subject headings
- Electronic location and address (URI / URL)

3

Integrating entry cataloging

- The existing bibliographic record is changed to describe **the current iteration** of the resource

- Data elements of **previous iterations** are recorded in notes if required or if considered important

- **A new bibliographic record** is created only for certain changes in edition, mergers, splits, or when there is a new work; changes in physical medium still under consideration

  --Will be covered further ahead in this session

5

Review:
Basis of the description for IRs

	Area	Basis of Description
1	Title and statement of responsibility	Current iteration
2	Edition	Current iteration
3	Type and extent of resource	Current iteration
4	Place and publisher	Current iteration
	Dates	First and/or last iteration
5	Physical description	Current iteration
6	Series	Current iteration
7	Notes	All iterations (& any source)
8	Standard numbers	All iterations (& any source)

Notes for changes in description

- Make notes on information no longer present in current iteration, or that appeared in a different form in previous iterations, if considered to be important.

- If the changes have been numerous, make a general statement.

- Rules are given for each area, for example:
    - 12.7B5.2b: Change in parallel title.
    - 12.7B6.2b: Change in other title information.
    - 12.7B7.2b: Change in statements of responsibility.
    - 12.7B9.2b: Change in edition information.
    - 12.7B11.2b: Change in place of publication or publisher.

7

Identification of iterations in notes: LCRI 12.7A2

- When a data element changes (LC/PCC practice):
    - Give **exact information** about the timing of the change if that information is readily available
    - If exact information is not readily available, **use information already in the record** to locate in time the presence of the earlier data element
        - Give that information in angle brackets
        - For electronic IR: use the date from the "viewed on" information
        - For non-electronic IR: use information from a "Description based on" note

8

Change in title proper: 12.1B8 and 21.2C1

If changes appear in title proper in later iteration:
- Do not create a new record
- Change the title and statement of responsibility area (245 $a/n/p) to reflect the current iteration
- And, in most cases, give the earlier title proper in a note
    - LCRI: Identify which prior iteration had this form of the title proper

- If considered necessary for access, make an added entry for the title proper of an earlier iteration

- Use MARC 247 and/or 547 fields for this
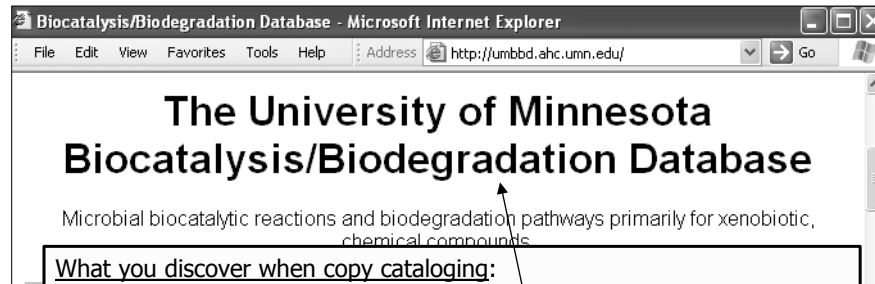   - See section on notes ahead (12.7B42) for examples

9

Change in title proper note: 12.7B4.2

- Make notes on earlier titles proper
- MARC tagging:
  - **247: Former title proper**
    - Use to generate title added entry in addition to note.
    - Use for title proper only.
    - Give in chronological order from oldest to most recent.
  - **547: Former title proper complexity note**
    - Use for more complex situations and/or when a title added entry is not needed.
    - **LCRI** 12.7B4.2: Give a separate 547 "Title history" note in addition to the 247 field only if the situation requires more explanation than can be given in the 247 field.

10

Change in title proper example, slide 1

Biocatalysis/Biodegradation Database - Microsoft Internet Explorer

File   Edit   View   Favorites   Tools   Help   Address http://umbbd.ahc.umn.edu/   Go

The University of Minnesota Biocatalysis/Biodegradation Database

Microbial biocatalytic reactions and biodegradation pathways primarily for xenobiotic, chemical compounds

What you discover when copy cataloging:

Title appearing on current iteration of home page [viewed on Dec. 15, 2002]

--differs from title recorded in existing record for the Web site

Existing record created in March 2000:

245 00 **Database of biocatalysis and biodegradation information** $h [electronic resource].

500   Title from home page **(viewed on Mar. 4, 2000).**

Change in title proper example, slide 2

Steps to modify the existing record:

1. Change the title in the 245 to match the current iteration.
2. Move the former title to a 247 note/added entry field.
3. Move the former date viewed to subfield $f of the 247 field.
4. Change the date viewed in the 500 note to current date (current iteration).

---

245 00 **Database of biocatalysis and biodegradation information** $h [electronic resource].

500   Title from home page (**viewed on Mar. 4, 2000).**

Record updated in December 2002:

245 04 **The University of Minnesota biocatalysis/biodegradation database** $h [electronic resource].

247 10 Database of biocatalysis and biodegradation information **$f <Mar. 4, 2000>**

500   Title from home page **(viewed on Dec. 15, 2002).**

Change in title proper and Links

- **If** you change a title proper in a bibliographic record,

- **And** that record has a reciprocal linking note for bibliographic history or relationships (76X-78X)

- **Then** you must also change the linking field on the other record!

13

Changes to parallel title, other title information: 12.1D-E

- Change the title and statement of responsibility area (245 $b) to reflect the current iteration.
  - Applies to other title information only if previously recorded in Area 1
- Make a note of the earlier form only if considered important.
  - Record former other title information in field 246 and explain the situation in subfield $i.
  - Use field 247 and 547 only for former title proper info.

14

Change in other title information example

The Nine Planets - Microsoft Internet Explorer

File   Edit   View   Favorites   Tools   Help   Address edu/nineplanets/nineplanets/nineplanets.html   Go

The Nine Planets

A Multimedia Tour of the Solar System

by Bill Arnett

The Nine Planets is an overvi... knowledge of each of the planets an... images, some have sounds and mo... information.

Subtitle on home page [when viewed on Dec. 15, 2002] differs from subtitle in existing record

Existing record created in October 1999:

245 14 The nine planets $h [electronic resource] **: $b a tour of the solar system** / $c by Bill Arnett.

500   Title from home page **(viewed on Oct. 9, 1999).**

Change in other title information: Option 1

The Nine Planets - Microsoft Internet Explorer

File   Edit   View   Favorites   Tools   Help   Address   edu/nineplanets/nineplanets/nineplanets.html   Go

The Nine Planets

A Multimedia Tour of the Solar System

by Bill Arnett

The Nine Planets is an overview of the history, mythology, and current scientific knowledge of each of the planets and moons in our solar system. Each page has text and

Option 1 for updating the record: no note or added entry:

245 14 The nine planets $h [electronic resource] : $b a
multimedia tour of the solar system / $c by Bill Arnett.

500   Title from home page **(viewed on Dec. 15, 2002).**

Change in other title information: Option 2

The Nine Planets - Microsoft Internet Explorer

File   Edit   View   Favorites   Tools   Help   Address   edu/nineplanets/nineplanets/nineplanets.html   Go

The Nine Planets

A Multimedia Tour of the Solar System

by Bill Arnett

Option 2 for updating the record: note but no added entry:

245 14 The nine planets $h [electronic resource] : $b a
multimedia tour of the solar system / $c by Bill Arnett.

**246 0_ $i Former subtitle: $a Tour of the solar system $f
<Oct. 9, 1999>**

Either 246 0 or 500 may be used to tag the note

**500   Former subtitle: A tour of the solar system <Oct. 9,
1999>.**

Change in other title information: Option 3

The Nine Planets - Microsoft Internet Explorer

File   Edit   View   Favorites   Tools   Help   Address   edu/nineplanets/nineplanets/nineplanets.html   Go

The Nine Planets

A Multimedia Tour of the Solar System

by Bill Arnett

The Nine Planets is an overview of the history, mythology, and current scientific

Option 3 for updating the record: note and added title entry:

245 14 The nine planets $h [electronic resource] : $b a
multimedia tour of the solar system / $c by Bill Arnett.

**246 1_ $i Former subtitle: $a Tour of the solar system $f
<Oct. 9, 1999>**

500   Title from home page (viewed on Dec. 15, 2002).

Changes to statement of responsibility: 12.1F5, 12.7B7.2

- Change the title and statement of responsibility area (245 $c)
- Make a note of the earlier form only if considered important.
  - Record former statements of responsibility in field 500 if person or field 550 if corporate body

19

Change in edition information: 12.2F1b

- If edition information is added, deleted, or changed in a later iteration, **and this change does not require a new description**:
  - Change the edition area to reflect the current iteration.
  - Make a note if the change is considered to be important.
- When does a change require a new description?
 - See also LCRI 12.2F1 for guidelines (next slide)

20

Change in edition information: LCRI 21.3B

- **For updating loose-leafs:**
  - **Do not make a new description for a gradual replacement edition**
    - (i.e., the author or publisher considers the publication to be a new edition and issues a replacement title page with a new edition statement but does not issue a new base volume); give a note about the new edition statement (see LCRI 12.7B9).
  - **In determining if there is a new resource, consider presence/absence and change of header/footer dates**
    - See LCRI 21.3B for different situations

- **For updating remote access electronic resources:**
  - **Make a new description only if the resource described in the existing record continues to exist as a resource separate from the new resource to be cataloged.**

21

Change in edition example 1
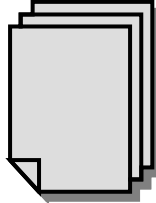
Gradual replacement edition of loose-leaf:

--Publisher issued a replacement title page with a new edition statement but did not issue a new base volume.

Change 250 edition statement in existing record and add note on the change

```
245 10 Tax-advantaged securities :
and other vehicles / $c by Robert J. Haft and Peter M.
Fass.
250     4th ed.
260     [St. Paul, Minn.] : $b West Group, $c 1981-
500     Original edition statement: 3rd ed.; updated to 4th
ed., 1987.
500     Description based on: t.p., v. 4F-4G, release #58,
Sept., 1998.
```
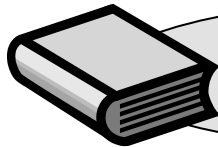
Change in edition example 2

Complete replacement edition of loose-leaf:

Publisher issued *in toto* replacement of base volume with new edition.

Create new record for new ed.

(May also link to record for 1st ed. using 780 linking entry)

```
245 00 CONSER cataloging manual / ‡c Jean L. Hirons,
editor.
260     Washington, DC : ‡b Library of Congress, Cataloging
Distribution Service, ‡c 2002-
250     2002 ed.
300     v. (loose-leaf) ; $c 29 cm.
780 00 $t CONSER cataloging manual. $b 1st ed. $z
0844407844 $w (DLC)___93009913_$w (OCoLC)27813639
```

Change in Type and extent of resource

- This area was eliminated with the deletion of rule 9.3 in the 2004 update to AACR2

- If this area was used in the description and the type and/or extent changes, delete the 256 field
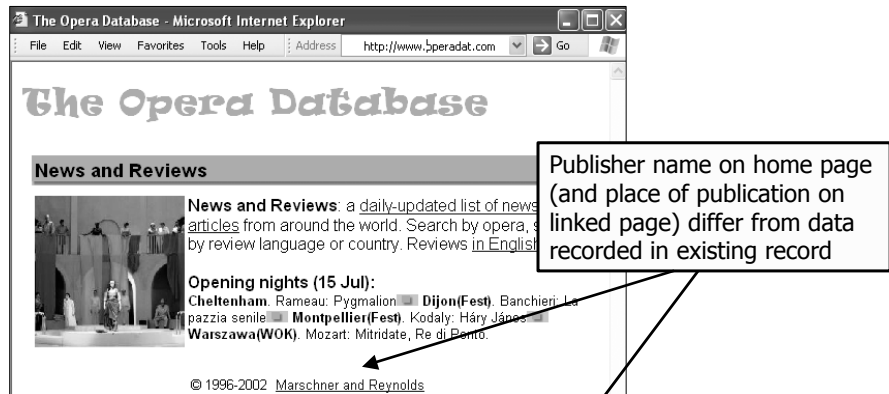
24

Change in place or name of publisher: 12.4C2 ; 12.4D2

- If the place and/or name of the publisher, distributor, etc. changes in a later iteration:
  - Change the publication, distribution, etc., area to reflect the current iteration
  - Give the earlier place and/or name in a 500 note if considered important.

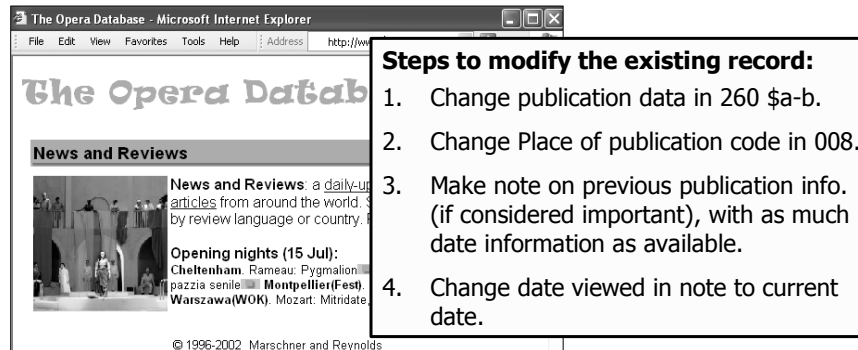 - Also change MARC 008 Place of publication code to match place of current publisher!

25

Change in publisher place & name example (1)

Publisher name on home page (and place of publication on linked page) differ from data recorded in existing record

Existing record created in May 1997:

```
008    Ctry: vau
245 04 The opera database $h [electronic resource].
260    Richmond, VA : $b Kramer and Reynolds, $c 1996-
500    Title from home page (viewed on May 22, 1997).
```

Change in publisher place & name example (2)

Steps to modify the existing record:

1. Change publication data in 260 $a-b.

2. Change Place of publication code in 008.

3. Make note on previous publication info. (if considered important), with as much date information as available.

4. Change date viewed in note to current date.

Record updated in December 2002:

```
008    Ctry: mdu
245 04 The opera database $h [electronic resource].
260    Baltimore, Md. : $b Marschner and Reynolds, $c 1996-
500    Title from home page (viewed on Dec. 15, 2002).
500    Formerly published by Kramer and Reynolds, Richmond, VA,
1996-<May 22, 1997>.
```

Change in physical description: 12.5 (1)

- <u>Change in other physical details</u>
    - 12.5C2: Change area (300 $b) to reflect current iteration and make a note about difference if important; also update 008 if needed

- <u>Change in dimensions of updating loose-leaf</u>
    - Note: error in rule 12.5D2 corrected in LCRI:
    - If dimensions change, change area to match current iteration and make note about difference if important

28

Change in physical description: 12.5 (2)

- *When updating loose-leaf is completed:*
    - Record the number of volumes

```
300      2 v. (loose-leaf) : $b ill. ; $c 28 cm.
```

29

Change in series statement: 12.6B2

- If a series is added, deleted, or changed in a later iteration:
  - Change the series area to reflect the current iteration.
    - MARC 4XX and/or 8XX.
  - Make a note if the change is considered important.
    - Retain former series entries in 8XX if traced, justified by 500 note explaining the change in series.

  - LCRI 21.30L: Integrating Resource in One or More Series
    - LC practice: Also provide an 8XX series added entry for any traced series included in a note. (Series not present on the latest iteration will be given in the note area instead of in the series area — cf. AACR2 12.6B2 and 12.7B14.2b.)

30

Change in series statement example
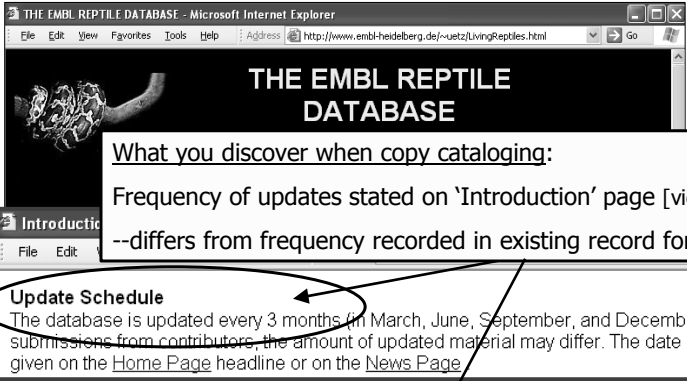
Existing record:

```
260      Denver : $b Smith Pub. Co.
440   0 Research in library acquisitions
500      Title from title screen (viewed on Oct. 3, 1991).
```

Same record updated:

```
260      Denver : $b Smith Pub. Co.
490 1  Library acquisitions
500    Series title <Oct. 3, 1991>: Research in library
   acquisitions.
500      Title from home page (viewed on Dec. 15, 2002).
830   0 Research in library acquisitions.
830   0 Library acquisitions (Denver, Colo.)
```

Change in frequency of updates (1)

THE EMBL REPTILE DATABASE - Microsoft Internet Explorer

File Edit View Favorites Tools Help | Address http://www.embl-heidelberg.de/~uetz/LivingReptiles.html Go

THE EMBL REPTILE
DATABASE

What you discover when copy cataloging:

Frequency of updates stated on 'Introduction' page [viewed on Dec. 15, 2002]

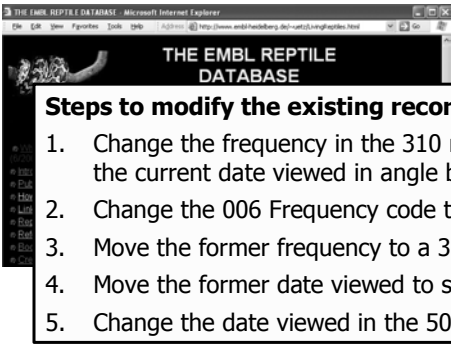--differs from frequency recorded in existing record for the database

Introductio

File Edit

Update Schedule
The database is updated every 3 months (in March, June, September, and December). Depending on submissions from contributors, the amount of updated material may differ. The date of the latest update is given on the Home Page headline or on the News Page.

Existing record created in February 1998:

Freq: f   Regl: r

245 04 The EMBL reptile database $h [electronic resource].

310   Updated semiannually

500   Title from home page **(viewed on Feb. 8, 1998).**

Change in frequency of updates (2)

THE EMBL REPTILE DATABASE - Microsoft Internet Explorer

File Edit View Favorites Tools Help   Address http://www.embl-heidelberg.de/~uetz/LivingReptiles.html Go

THE EMBL REPTILE
DATABASE

Steps to modify the existing record:

1. Change the frequency in the 310 note to match the current iteration, add the current date viewed in angle brackets in subfield $b.
2. Change the 006 Frequency code to the current frequency.
3. Move the former frequency to a 321 note field.
4. Move the former date viewed to subfield $b of 321 field.
5. Change the date viewed in the 500 note to current date (current iteration).

Record updated in December 2002:

Freq: q   Regl: r

245 04 The EMBL reptile database $h [electronic resource].

310   Updated quarterly, $b <Dec. 15, 2002>

321   Updated semiannually, $b <Feb. 8, 1998>

500   Title from home page **(viewed on Dec. 15, 2002).**

Changes to access points

Changes in name and uniform title entries.

- Make changes to reflect latest iteration.
- Retain entries for past iterations.
  - If considered important for access.
- Choice of main entry could change.
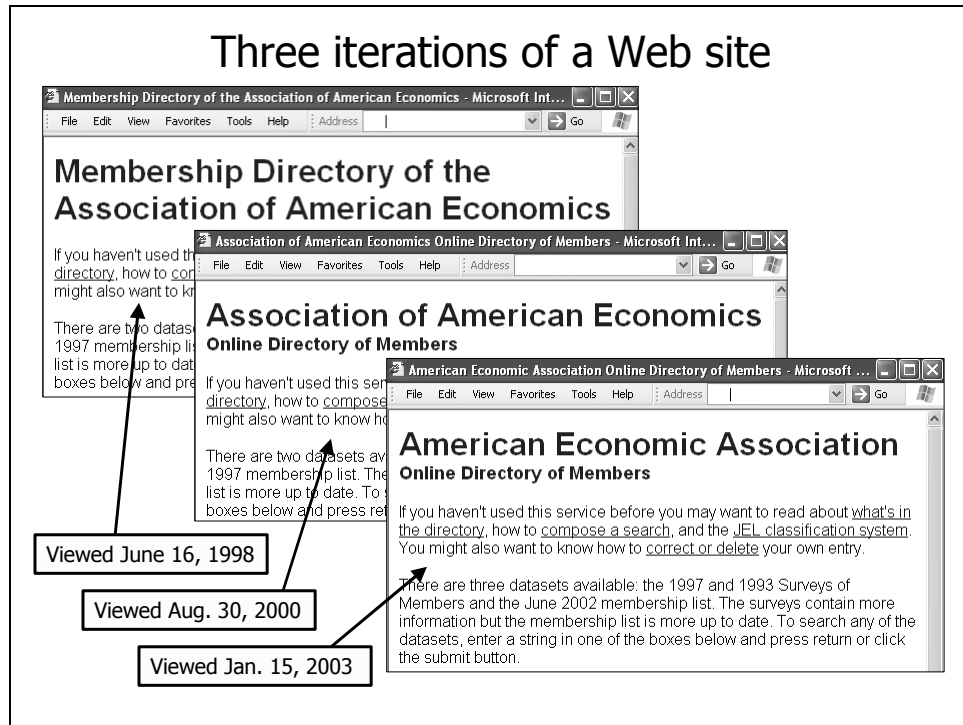 - Apply Chapter 21 to current iteration.

34

Change in main entry

- Change **1XX** entry for person or body currently responsible for the resource.
- Make note for earlier responsible person in **500** or body in **550** note, if considered important.
  - Required to justify 7XX entry if present in full level records
  - Include dates to identify iteration.
- Add name for earlier person or body in **7XX** if considered important for access.

35

Three iterations of a Web site

Membership Directory of the Association of American Economics - Microsoft Int...

File   Edit   View   Favorites   Tools   Help   Address

Membership Directory of the Association of American Economics

If you haven't used th...
directory, how to cor...
might also want to kn...

There are two datase...
1997 membership li...
list is more up to dat...
boxes below and pre...

Association of American Economics Online Directory of Members - Microsoft Int...

File   Edit   View   Favorites   Tools   Help   Address

Association of American Economics
Online Directory of Members

If you haven't used this ser...
directory, how to compose...
might also want to know h...

There are two datasets av...
1997 membership list. The...
list is more up to date. To...
boxes below and press ret...

American Economic Association Online Directory of Members - Microsoft ...

File   Edit   View   Favorites   Tools   Help   Address

American Economic Association
Online Directory of Members

If you haven't used this service before you may want to read about what's in the directory, how to compose a search, and the JEL classification system. You might also want to know how to correct or delete your own entry.

There are three datasets available: the 1997 and 1993 Surveys of Members and the June 2002 membership list. The surveys contain more information but the membership list is more up to date. To search any of the datasets, enter a string in one of the boxes below and press return or click the submit button.

Viewed June 16, 1998

Viewed Aug. 30, 2000

Viewed Jan. 15, 2003

Bibliographic record updated (1): first title change

```
110 2  Association of American Economics.

245 10 Membership directory of the Association of American
Economics $h [electronic resource].

500    Title from HTML header (viewed on June 16, 1998).
```

```
110 2  Association of American Economics.

245 10 Association of American Economics online directory
of members $h [electronic resource].

247 10 Membership directory of the Association of American
Economics $f <June 16, 1998>

500    Title from HTML header (viewed on Aug. 30, 2000).
```

Bibliographic record updated (2):
second title change + change of main entry

```
110 2  American Economic Association.

245 10 American Economic Association online directory of
members $h [electronic resource].

247 10 Membership directory of the Association of American
Economics $f <June 16, 1998>

247 10 Association of American Economics online directory
of members $f <Aug. 30, 2000>

500    Title from HTML header (viewed on Jan. 15, 2003).

550    Issued by Association of American Economics <June
16, 1998>.

710 2  Association of American Economics.
```

Changes in subject headings

- Original headings should be broad enough to encompass changing subject content.
- If significant additions, deletions, or other changes in subject content considered important:
  - Add new subject headings for current iteration and/or delete headings no longer applicable to the resource.

39

When resource is completed

I.e., when you know that updating has ceased:

- Close off the record:
- Record ending date, if known
  - In 260 $c if cataloging from last iteration
    - Include date of last update for loose-leaf if different from last date of publication given on chief source
  - In 362 1 if not cataloging from last iteration
  - Change 008 Date 2 from "9999" to ending date.
- Change physical description of loose-leaf:
  - Add number of volumes

40

Closing record for completed resource

Existing record:

008	DtSt: c **Dates: 1997,9999**
260	Denver : $b Smith Pub. Co.**, $c 1997-**
500	Title from title screen (viewed on Oct. 3, 1997).

Same record updated based on known last iteration:

008	DtSt: d **Dates: 1997,2003**
260	Denver : $b Smith Pub. Co.**, $c 1997-2003.**
500	Title from home page (viewed on Jan. 15, 2003).

Same record updated without known last iteration: (one of several possibilities)

008	DtSt: d **Dates: 1997,2003**
260	Denver : $b Smith Pub. Co.**, $c 1997-**
362 1	**Updating ceased in 2003?**
500	Title from home page (viewed on Jan. 15, 2003).

Session 3 Exercises:

Exercise A. Change in title proper

A1) Resource as it appears when you view it on May 4, 2001:

A2) Existing record has:

245	00	EDGAR database of corporate information $h [electronic resource].
500		Title from title screen (viewed Nov. 13, 2000).

A3) Update the record for the title change:

245	00	
246	__	
247	10	
500		Title from (viewed on May 4, 2001).

Exercise B. Second change in title proper

B1) Resource as it appears when you view it on December 2, 2002:

B2) Existing record has your data from A3 above.

B3) Update the record for the second title change:

245	00	
246	__	
246	__	
246	__	
247	10	
247	10	
500		Title from (viewed on Dec. 2, 2002).

Exercise C. Change in statement of responsibility and main and added entries

C1) Resource as it appears when you view it on December 2, 2002:

C2) Existing record has:

100	1_	Morton, Susan E., $d 1955-
245	10	Publishers of non-fiction articles $h [electronic resource] : $b a database for writers / $c by Susan E. Morton and Joseph P. Stein.
500		Title from home page (viewed on Jan. 22, 2001).
700	1_	Stein, Joseph P., $d 1953-

C3) Update the record for the changes

Note: your check of the LCNAF yields the following authorized forms:
- Stein, Joseph P., $d 1953-
- Morton, Susan E., $d 1955-2001.
- Garcia, Julia M., $d 1961-

100	1_	
245	10	
500		Title from (viewed on).
500		
700	1_	
700	1_	

Optional Exercise D. Final iteration of updating loose-leaf

Existing Record:

Type: a	ELvl: I	Srce: d	GPub: s	Ctrl:	Lang: eng	
BLvl: i	Form:	Conf: 0	Freq: a	MRec:	Ctry: miu	
S/L: 2	Orig:	EntW:	Regl: r	Alph: a		
Desc: a	SrTp: l	Cont: 0	**DtSt: c**	**Dates: 1989,9999**		

245 00	Guidelines for typewriting doctoral dissertations.
260	Ann Arbor, MI. : $b University of Michigan Press**, $c 1989–**
300	**v.** (loose-leaf) ; $c **26 cm.**
310	**Updated annually, $b 1997–**
321	Updated semiannually, $b 1989–1996

INFORMATION: This loose-leaf resource is now completed; you have the final iteration, Update 22, dated January 2002, which consists of two volumes that are both 28 cm. high. Presume that the beginning date of publication in the catalog record was based on the first iteration of the loose-leaf.
 [A note printed on the this final iteration says that a new loose-leaf publication, to be titled "Guidelines for word-processing doctoral dissertations," will be forthcoming to replace this now defunct publication.]

Same record updated and revised according to the AACR2 2002 revisions:

Type: a	ELvl: I	Srce: d	GPub: s	Ctrl:	Lang: eng	
BLvl: i	Form:	Conf: 0	Freq: ___	MRec:	Ctry: miu	
S/L: 2	Orig:	EntW:	Regl: ___	Alph: a		
Desc: a	SrTp: l	Cont: 0	DtSt: ___	Dates: _____,_____		

245	00	Guidelines for typewriting doctoral dissertations.
260		
300		
310		
321		Updated semiannually, $b 1989–1996

Session 4 Copy Cataloging of Integrating Resources, Record Modifications and Maintenance

Session 4

Copy Cataloging, Record Modification, and Record Maintenance for Integrating Resources

Goals of Session 4

Explore and discuss:

- Issues in identifying existing records for integrating resources
  - Especially if access points, by which you search for matching records, have changed

- Issues in modifying existing records cataloged under old rules and practices
  - How much needs to be changed?

- Issues in ongoing maintenance of records for integrating resources

2

Searching for existing records for IRs

- How to search?
  - Are title, publisher, responsible persons or bodies, and/or URI the same in the existing record as in the iteration of the resource you are viewing
    - Helpful: OCLC Connexion Client allows searching by "Access Method" and "Access Method Phrase" (see next slide) and it also has boxes that allow you to limit searches to format Integrating Resources and to Internet resources

- Search results will reflect past cataloging practice
  - For example: Iterations vs. editions:
    - What are now iterations of an IR may have been treated as separate editions of a monograph
    - There may be multiple records for different 'editions' or 'releases' of an integrating resource that today would be cataloged on one record.

3

OCLC Connexion URL searching

From Connexion Client Help:

Access method index (am:)
- Each punctuation mark is treated as a word division. Thus, *www.oclc.org* is treated as three separate words: *www*, *oclc*, and *org*.
- Omit *http:* and *https:*
- Include stopwords when searching the Access Method index (am:)

Example:
To search for URL *www.poets.org* in the Command Line, type am:poets.

Access method phrase index (am=)
- Select this phrase index when you want to find records that contain a URL exactly matching your search term.
- Include as much of the URL as you know. Omit *http:// or https://*. Enter the complete URL, beginning with *www.* (or other first segment) and all separator characters (. and /) to retrieve exact matches. If you are unsure of the parts following the domain name, type a single slash after the domain and then add an asterisk to match any URLs that begin with this domain.

Example: *www.noaa.gov/* or *www.uic.edu/*

OCLC Connexion URL searching

Search WorldCat dialog box:

Command Line Search

Enter numeric, derived, keyword, or scan search here...

Keyword/Numeric Search

☐ Retain Search

Search for:
loc gov — Access Method (am:)
OR — lcweb.loc.gov/catdir/pcc/ — Access Method Phrase (am=)
AND — — Title (ti:)

Language: [Any]   Format: [Any]   Internet: [Any]

Source: [Any]   Microform: [Any]   Years: ___   Material Type: [Any]

Display Search Results
⦿ System Default List   ○ Truncated List
○ Brief List   ○ Full Record

Enter Diacritics...   Expand/Collapse

OK   Cancel   Clear Search   Help

Search results in OCLC WorldCat:
Scholarly electronic publishing bibliography

8 records found by scan title search in WorldCat:

1. Scholarly Electronic Publishing Resources [electronic resource]. Electronic data. University of Houston Libraries, **2000-06-20**. [COMPUTER FILE] OCLC: 44480522

2. Bailey, Charles W. (Charles Wesley), 1950- Scholarly electronic publishing bibliography / Charles W. Bailey, Jr. **Version 2:11/15/96**. Houston, TX : University Libraries, University of Houston, **1996**. OCLC: 37697102

3. Bailey, Charles W. (Charles Wesley), 1950- Scholarly electronic publishing bibliography [electronic resource] / Charles W. Bailey, Jr. Electronic data [Houston] : University of Houston Libraries, **c1996-** [ELECTRONIC] OCLC: 35870002

4. Bailey, Charles W. (Charles Wesley), 1950- Scholarly electronic publishing bibliography / Charles W. Bailey, Jr. **Version 11:8/25/97**. [Houston] : University of Houston Libraries, **c1997**. OCLC: 37697302

5. Bailey, Charles W. (Charles Wesley), 1950- Scholarly electronic publishing bibliography / Charles W. Bailey, Jr. **Version 22:11/20/98**. [Houston] : University of Houston Libraries, **c1998**. [COMPUTER FILE] OCLC: 44377149

6. Bailey, Charles W. (Charles Wesley), 1950- Scholarly electronic publishing bibliography / Charles W. Bailey, Jr. **Version 16:2/19/98**. [Houston] : University of Houston Libraries, [c1998] OCLC: 38731132

7. Bailey, Charles W., 1950- Scholarly electronic publishing bibliography / Charles W. Bailey. **Version 39 : 10/24/2001**. Houston, Tex. : University of Houston Libraries, c2001. [**REPRODUCTION**] OCLC: 48992925

8. Bailey, Charles W., (Charles Wesley), 1950- Scholarly electronic publishing bibliography / Charles W. Bailey. **Version 41: 2/22/2002**. Houston : University of Houston Libraries, **2002**. [**REPRODUCTION**] OCLC: 49516825

Search results in OCLC WorldCat:
USDA National Nutrient Database for Standard Reference

9 records found by scan title search in WorldCat:

1. USDA national nutrient database for standard reference. Beltsville, Md. : USDA, Nutrient Data Laboratory, Agricultural Research Service, [**SERIAL**] [ELECTRONIC] OCLC: 51231416

2. USDA national nutrient database for standard reference [electronic resource]. **Release 15**. Electronic data and program. Beltsville, Md. : USDA, Nutrient Data Laboratory, Agricultural Research Service, **[2002]-** [COMPUTER FILE] AGL OCLC: 50863495

3. USDA nutrient database for standard reference [electronic resource]. Riverdale, Md. : USDA, Nutrient Data Laboratory, Agricultural Research Service, **[1999-** [**SERIAL**] [ELECTRONIC] DLC OCLC: 435641

4. USDA Nutrient Database for Standard Reference [electronic resource]. **Release 12** [Riverdale, Md.] : Nutrient Data Laboratory, Agricultural Research Service, Beltsville Human Nutrition Research Center, **[1999]** [ELECTRONIC]: 41907546

5. USDA nutrient database for standard reference [electronic resource]. **Release 12**. Riverdale, Md. : USDA, Nutrient Data Laboratory, Agricultural Research Service, [1999] **1 computer optical disc ; 4 3/4 in.** [COMPUTER FILE]: 41315784

6. USDA nutrient database for standard reference [electronic resource]. **Release 13**. Beltsville, Md. : USDA, Nutrient Data Laboratory, Agricultural Research Service, 2000. **1 computer optical disc ; 4 3/4 in.** [COMPUTER FILE] OCLC: 44093926

7. USDA nutrient database for standard reference [electronic resource] / Nutrient Data Laboratory, Agricultural Research Service. **Release 14.** [Beltsville, Md.?] : The Laboratory, **[2001]** [ELECTRONIC] PCC OCLC: 49526685

8. USDA Nutrient Database for Standard Reference [electronic resource]. **Release 14**. [Riverdale, Md.] : Nutrient Data Laboratory, Agricultural Research Service, Beltsville Human Nutrition Research Center, **[2001]** [ELECTRONIC]: 48808234

9. USDA nutrient database for standard reference [electronic resource]. **Release 14**. Beltsville, Md. : Nutrient Data Laboratory, Beltsville Human Nurtition Research Center, Agricultural Research Service, [2002] **1 CD-ROM ; 4 3/4 in.** [COMPUTER FILE] PCC OCLC: 50048252

One record for this database has been cataloged as a serial

```
 OCLC:  51231416

Type: a    ELvl: I    Srce: d    GPub:      Ctrl:      Lang: eng
BLvl: s    Form: s    Conf: 0    Freq: u    MRec:      Ctry: mdu
S/L: 0     Orig:      EntW:      Regl: u    ISSN:      Alph:
Desc: a    SrTp:      Cont:      DtSt: c    Dates: 2002,9999
006    m d
007    c ‡b r ‡d c ‡e n
245 00 USDA national nutrient database for standard reference ‡h
[electronic resource].
260    Beltsville, Md. : ‡b USDA, Nutrient Data Laboratory,
Agricultural Research Service,
362 1_ Electronic coverage as of 2002?
500    Description based on: Release 15 (2002); title from title
screen (viewed Dec. 16, 2002).
516    text/html
538    System requirements: Internet access; World Wide Web browser.
538    Mode of access: World Wide Web.
856 40 ‡u http://www.nal.usda.gov/fnic/cgi-bin/nut%5Fsearch.pl
```

Another record has been cataloged as a monograph for the latest release only

```
OCLC:  50863495

Type: m   ELvl: I   Srce:      Audn:       Ctrl:       Lang: eng
BLvl: m   File: m   GPub: f   MRec:                   Ctry: mdu
Desc: a                        DtSt: m   Dates: 2002,9999

007    c ‡b r ‡d m ‡e n
245 00 USDA national nutrient database for standard reference ‡h
[electronic resource].
246 1_ ‡i Title from HTML header: ‡a USDA nutrient database for
standard reference
250    Release 15.
256    Electronic data and program.
260    Beltsville, Md. : ‡b USDA, Nutrient Data Laboratory,
Agricultural Research Service, ‡c [2002]-
538    Mode of access: WWW browser; files also available for
download in DBF or ASCII text format.
500    Title from Web page (viewed on Oct. 25, 2002).
530    Also available on CD-ROM.
650 _0 Food ‡x Composition ‡v Databases.
856 40 ‡u http://www.nal.usda.gov/fnic/foodcomp/Data/SR15/sr15.html
```

Identifying and selecting existing records

- Finding an existing record
    - Is there a record that matches the resource I am cataloging?
    - Which record should I choose? (e.g., from search results on previous slides)

- Identifying the iteration
    - Which iteration am I viewing?
    - Which iteration was the original cataloger --or previous reviser-- of the record viewing?
    - Check the description based on / date viewed note!

10

Existing records created before Dec. 1, 2002

- **All cataloged as monographs, not as IR!**
- Will not reflect new rules or MARC tagging, for example:
  - No 006 coding for IR present
  - Former title proper in 500 or 246, not 247
  - Edition statement in 250 that would no longer be recorded as such
  - Publication dates in 260 $c when not from first iteration, e.g.: [199-?]-
  - Frequency of updates note in 500, not 310, or no frequency note at all
  - Bibliographic relations noted in 5XX fields; no links
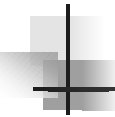
11

Modifying existing records

- How much in a record should be changed?
  - When is it critical to make changes?
  - When is it important to make changes?
  - When is it unimportant to make changes?
- How to deal with mixed practice?
  - Cataloging done according to various versions of AACR and LCRI
  - Valid at the time; data still accurate
- When to report needed changes to OCLC?
  - If no authorization to edit master record
  - When multiple records could be collapsed under new rules
- How have serials and loose-leaf catalogers approached these issues?

12

LC practice: when you have later iteration

- Update the description and add access points to reflect the current iteration as needed
- Accept the 260 $c in the existing record
- Add notes and access points if different information on other library's earlier iteration is important
- Add or update the "Description based on" note to reflect the current iteration
- Update 008 and update/add CR 006 as needed

13

LC practice: when you have earlier iteration

- Do not change the description to reflect your (earlier) iteration
- Accept the 260 $c in the existing record
- Add notes and access points if different information on your (earlier) iteration is important
- Do not change the "Description based on" note to reflect your (earlier) iteration
- Do not change the 008/006 to reflect your (earlier iteration); but do add CR 006 if lacking

14

Existing record for USDA National Nutrient Database

```
OCLC:  50863495
Type: m   ELvl: I   Srce:      Audn:      Ctrl:      Lang: eng
BLvl: m   File: m   GPub: f   MRec:               Ctry: mdu
Desc: a                       DtSt: m   Dates: 2002,9999

007    c ‡b r ‡d m ‡e n
245 00 USDA national nutrient database for standard reference ‡h
[electronic resource].
246 1_ ‡i Title from HTML header: ‡a USDA nutrient database for
standard reference
250    Release 15.
256    Electronic data and program.
260    Beltsville, Md. : ‡b USDA, Nutrient Data Laboratory,
Agricultural Research Service, ‡c [2002]-
538    Mode of access: WWW browser; files also available for
download in DBF or ASCII text format.
500    Title from Web page (viewed on Oct. 25, 2002).
530    Also available on CD-ROM.
650 _0 Food ‡x Composition ‡v Databases.
856 40 ‡u http://www.nal.usda.gov/fnic/foodcomp/Data/SR15/sr15.html
```

Existing record for Scholarly Electronic Publishing Bibliography

```
OCLC:  35870002
Type: a   ELvl: I   Srce: d   Audn:      Ctrl:      Lang: eng
BLvl: m   Form: s   Conf: 0   Biog:      MRec:      Ctry: txu
          Cont:     GPub:     LitF: 0   Indx: 0
Desc: a   Ills:     Fest: 0   DtSt: m   Dates: 1996,9999
006    m d
007    c ‡b r ‡d m ‡e n ‡f u
090    Z286.E43 ‡b B34 1996
100 1_ Bailey, Charles W. ‡q (Charles Wesley), ‡d 1950-
245 10 Scholarly electronic publishing bibliography ‡h [electronic
resource] / ‡c Charles W. Bailey, Jr.
256    Electronic data.
260    [Houston] : ‡b University of Houston Libraries, ‡c c1996-
538    Mode of access: Internet.
500    Title from title screen (viewed on Nov. 8, 1996).
500    Original edition statement: Version 1, 10-25-96; updated
irregularly.
856 40 ‡u http://info.lib.uh.edu/sepb/sepb.html ‡3 HTML version
856 40 ‡u http://info.lib.uh.edu/sepb/sepb.pdf ‡3 PDF version
```

Existing record for KnowThis.com

```
 OCLC:  44281054

Type: a   ELvl: 3   Srce: d   Audn:       Ctrl:      Lang: eng
BLvl: m   Form: s   Conf: 0   Biog:       MRec:      Ctry: pau
          Cont:     GPub:     LitF: 0   Indx: 0
Desc: a   Ills:     Fest: 0   DtSt: m   Dates: 1998,9999
006    m d
007    c ‡b r ‡d c ‡e n ‡f u
245 00 KnowThis.com ‡h [electronic resource] : ‡b marketing virtual
library.
246 1_ ‡i Title in HTML header: ‡a KnowThis.com : ‡b for market research,
Internet marketing, advertising, selling & more
246 1_ ‡i Former title: ‡a KnowMarketing : ‡b the Internet's marketing
virtual library
246 1_ ‡i Former HTML source title: ‡a TMVL, reference for marketing,
selling, advertising, promotion, e-commerce
256    Electronic text data.
260    West Chester, Pa. : ‡b West Chester University, ‡c c1998-
538    Mode of access: World Wide Web.
500    Title from title screen (viewed on Apr. 1, 2002).
500    This site is part of the World Wide Web virtual library and is
created and maintained by West Chester University.
500    Frequently updated.
856 40 ‡u http://www.knowthis.com
```

Another existing record, Encoding level K

```
OCLC:  44480522

Type: m   ELvl: K   Srce: d   Audn:       Ctrl:      Lang: eng
BLvl: m   File: d   GPub:               MRec:      Ctry: xxu
Desc:                         DtSt: e   Dates: 2000,0620
245 00 Scholarly Electronic Publishing Resources ‡h [electronic
resource].
246 3_ Scholarly electronic publishing bibliography.
256    Electronic data.
260    ‡b University of Houston Libraries, ‡c 2000-06-20.
538    Mode of access: World Wide Web.
500    Title from title screen.
516    HTML text and graphics.
538    Mode of access: World Wide Web.
500    Description based on view on: 06-20-2000.
650 _0 Scholarly electronic publishing ‡x Computer network resources.
650 _0 Internet publishing ‡x Computer network resources.
650 _0 Libraries and electronic publishing ‡x Computer network
resources.
650 _0 Electronic publishing ‡x Computer network resources.
710 2_ University of Houston. ‡b Libraries.
856    ‡q text/html ‡u http://info.lib.uh.edu/sepb/sepr.htm
```

NetFirst record

```
 OCLC:  49844459
Type: a   ELvl: 3    Srce: d   Audn:       Ctrl:       Lang: eng
BLvl: m   Form: s    Conf: 0   Biog:       MRec:       Ctry: xx
          Cont:      GPub:     LitF: 0   Indx: 0
Desc:     Ills:      Fest: 0   DtSt: n   Dates: uuuu,uuuu
006       m u
040       N@F ‡c N@F ‡d OCLCQ
082 04   551.6
082 04   551.6
245 00   National Weather Service (NWS): Office of Climate, Water, and Weather
Services ‡h [electronic resource].
516       World Wide Web Resource
520 8_   The Office of Climate, Water, and Weather Services of the National
Weather Service (NWS) of the U.S. National Oceanic and Atmospheric
Administration (NOAA) is headquartered in Silver Spring, Maryland. The office
oversees delivery of hydrometeorological and climate services. The office
provides information about its products and data analysis services.
610 24   United States. Dept. of Commerce. National Weather Service. Office of
Climate, Water, and Weather Services.
650 _4   Meteorological services.
650 _4   Climate.
651 _4   Silver Spring (Md.)
651 _4   Maryland.
856 40   ‡u http://www.nws.noaa.gov/om/
```

Modifying and maintaining IR records: range of issues

- Updating bibliographic information
    - Changes to reflect later iterations of the resource
    - Correcting obvious errors
    - Changes affecting access points
    - Giving information from earlier iterations in notes and added entries
- Changes to existing standards (AACR2, MARC 21; LCSH; Uniform titles)
- Upgrading minimal records
- Adding optional bibliographic elements
- Information from first or earlier iterations (e.g., earlier forms of title proper) given with notes and added entries if important
- Closing IRs that have ceased
- Modifying pre-AACR2 records
- Recataloging pre-AACR2 records (record conversion)
- Record consolidation (e.g., duplicate records or multiple records for different iterations of the same resource)

20

When to make a new record? (1)

- Very rarely! --That's the point of integrating entry

- General principle: make a new record when there is a new resource/work rather than another iteration of the same resource/work

- That is, when there is:
  - A new integrating resource
  - A merger of other resources (12.7B8b)
  - A split of an integrating resource into other resources (12.7B8c)
  - Original URI is still active but original resource is no longer available (LCRI 21.3B)

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When to make a new record (2) (LCRI 21.3B)

- **For updating loose-leafs:**
  - **Do not make a new description for a gradual replacement edition**
    - (i.e., the author or publisher considers the publication to be a new edition and issues a replacement title page with a new edition statement but does not issue a new base volume); give a note about the new edition statement (see LCRI 12.7B9).
  - **In determining if there is a new resource, consider presence/absence and change of header/footer dates**
    - See LCRI 21.3B for different situations

- **For updating remote access electronic resources:**
  - **Make a new description only if the resource described in the existing record continues to exist as a resource separate from the new resource to be cataloged.**

22

Electronic resource no longer available at original URI

- Original URI no longer active, but original resource still available at different URI

- Original URI still active, but original resource no longer available (i.e., not a different iteration of the original resource)

- See **LCRI 9.7B** for remote access electronic resources that are no longer available

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Original URI no longer active

- Use an Internet search engine to determine if the resource described in the record is now available at a different URI
- If found, update 856 $u in existing record
- If not found, LC practice:
  - Indicate in a note that the resource isn't findable (and the date you searched)
  - Include the reason, if known
  - Move the 856 $u to 856 $x
  - Suppress the bibliographic record from the OPAC

24

Different resource at old URI

- Treat the existing bibliographic record as on previous slides, depending on whether no longer available or available at a different URI
- Create a new record for the new resource if selected for cataloging

25

Ongoing maintenance questions

- **How to track changes?**
  - After cataloging is complete, how do you know when bibliographic elements in an online integrating resource have changed?
    - Serials and updating loose-leaves need to be checked in and new issues / iterations examined; changes can be spotted at that time; not so for remote access electronic resources
    - There are automated notification services for changes in URLs, but no way to automatically detect, for example, a change in title

- **Who will do it?**
  - Who will have authorization to update records (e.g. OCLC master records) for changes?
  - Will there be cooperative programs for record maintenance for IRs?

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Conclusion

Catalogers will face complicated situations when cataloging electronic IRs in the 'real world'

- We have looked at several issues, including:

  - Searching for, identifying, and selecting existing records for copy cataloging

  - Modifying existing records cataloged under old rules and practices

  - Ongoing maintenance of records for integrating resources

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Session 5 Electronic Integrating Resources: Case Studies for Discussion

Special Issues and Challenges in Cataloging Electronic IRs

<u>Case Study Topic #1</u>: Choice of **Type of Record** ("Type" and OCLC workform) and **Type of Computer File** ("File") codes.

Discussion questions:
1. What is the best choice of *Type* and *File* codes for each of the following resources based on the screen print surrogates given? Use the lists of codes from Appendix A along with the additional guidelines given below.
2. When is it difficult to determine whether a Web resource is primarily textual/language material or primarily computer-based?
3. What constitutes "significant audio or video" that makes a Web site cross the invisible line from being text/language material to some other type of material for coding purposes?
4. What constitutes an "online system or service"?
5. What constitutes "interactive multimedia"?
6. When is numeric data text-based and when computer-based?
7. When should File code "m" be used?
8. How should we code databases of images, maps, or sound files as opposed to text?

<u>See Appendix A</u> for the complete list of Type of Record (Leader/06 ; OCLC "Type") codes.

Additional Guidelines for the exercise:

<u>Use Type "m" Electronic resource (Computer file) for:</u>

1. Computer Software
- When the resource consists of computer software, including programs, games and fonts.

2. Numeric Data
- When the resource consists of numeric data such as census or survey data that resides in a database and that is manipulable by computer. [Numeric data presented solely in eye-readable, tabular form and that is not manipulable by computer is the equivalent of a text document and is cataloged as language material (Type "a")]

3. Computer-Oriented Multimedia
- When the resource consists of (1) the combination of two or more media, such as audio, video, images, animation, etc., and (2) no single aspect comprises the significant content.

4. Online System or Service
- When the resource constitutes an online system or service supports system-based user interaction. The presence of search software or of active hyper-links do not constitute computer programs and do not make resources online systems or services for cataloging purposes. In the area of online systems and services, consider whether the system itself (for example, a library system providing an interface to several databases), or the content of the several constituent databases, is being cataloged. When cataloging the system itself, use "Type" code "m" and "File" code "j".

Examples of online systems or services include:
- Online library systems (consisting of a variety of databases)
- FTP sites
- Electronic bulletin boards
- Network information centers
- Campus-wide information systems
- Discussion groups or lists (via "listserv" or newsgroup)
- News and weather reports with system-based user interaction
- Airline reservation system
- Online stock investment site

Use Type "a" Language Material for:
- World Wide Web Sites, when the content consists of primarily textual Web pages with incidental images, hypertext links, or search software: ACLU web site
- Collections or databases of textual electronic serials with search software
- Web portal pages consisting of textual links to other resources
- Online bibliographic databases such as library online catalogs
- Numeric data presented in tabular form not manipulable by computer

References:
- Guidelines for Coding Electronic Resources in Leader/06 (Library of Congress): http://www.loc.gov/marc/ldr06guide.html
- Cataloging Electronic Resources: OCLC-MARC Coding Guidelines: http://www.oclc.org/support/documentation/worldcat/cataloging/electronicresources/

Type of Computer File (Computer File 008/26 and 006/09 ; OCLC "File"):

Complete list of MARC Type of computer file codes:
a - Numeric data
b - Computer program
c - Representational
d - Document
e - Bibliographic data
f - Font
g - Game
h - Sound
i - Interactive multimedia
j - Online system or service
m - Combination
u - Unknown
z - Other
| - No attempt to code

```
Additional Guidelines:
```

- **d - Document**: Use this code when Type of Record is "a" and the resource consists of textual content, containing mostly alphabetic information (words or sentences) converted into a code that can be processed, sorted, and manipulated by machine, and then retrieved in many optional formats. Use for records containing full text of documents and language material intended to constitute a textual document, whether represented as ASCII or image data. Code d includes both single bibliographic entities or a collection of bibliographic entities. Documents whose primary purpose is textual, even if search software is present, are coded with code d.

- **e - Bibliographic data**: Use this code when Type of Record is "a" and the resource consists of data that are bibliographic citations. This includes library catalogs or citation databases. The data may be in a structured or unstructured form. Search software may be present, but the purpose of the record is description of the content of the bibliographic data or database, rather than description of the online system or service.
- **i - Interactive multimedia**: Use this code when Type of Record is "m" and the resource described by the record supports navigation through and manipulation of many kinds of media (audio, video, etc.) in which the user has a high level of control, often allowing an almost conversational interaction with the computer and the data.
- **j - Online system or service**: Use this code when Type of Record is "m" and the record describes an online system or service (that may or may not contain bibliographic information). An online system or service supports system-based user interaction. If the focus of the record is to describe the system itself, with the content of the databases incidental contained therein, it is coded j. If the resource is an online file where the system is incidental to the description, it falls into another category. Examples of online systems or services are: online library systems (consisting of a variety of databases), FTP sites, electronic bulletin boards, network information centers, or campus-wide information systems.
- **m - Combination**: Use this code when Type of Record is of any type, but most often "m," and the resource being described is a combination of two or more of the other types of files. Examples of combination resources include computer models and numeric data files; computer programs and text files; and the like. When a World Wide Web site consists of significant audio and video, or of several types of data and the software to process the data, and/or if the cataloger is unable to determine predominance, use File code "m."

Extract from "Guidelines for Coding Electronic Resources in Leader/06" (Network Development and MARC Standards Office, Library of Congress): http://www.loc.gov/marc/ldr06guide.html**:**

3. Examples of types of electronic resources

Example	Ldr/06	008/26	006/09

Online Bibliographic Database
     LC-Books file
     Medline
	a		e

Collection of online databases
     MEDLARS
     LOCIS
     LC-MUMS
	m	j	

Web-based computer software The universal currency converter	m	b	

CD-ROM of a census with manipulable numeric data (Mono or serial)
     1996 National and state summary data tables ()
     Common core of data (CCD)
	m	a	

Electronic serial with search software MLA international bibliography	a		e

Collection of electronic serials with search software
     JSTOR
     Project Muse
	a		d

Electronic journal 　　American imago	a		d
CD-ROM of a census in textual form (mono or serial) 　　County business patterns	a		d
Online system or service 　　Internet Grateful Med 　　Airline reservation system 　　Online stock investment site	m	j	
Web site with significant audio and video 　　CNN Web site	m	m	
Web "portal page" (Web page with collection of links) 　　Tools for serials catalogers	a		d

Resource 1A

Resource 1B:

Resource 1C:

Resource 1D:

Resource 1E:

Resource 1F:

Resource 1G:

From the "About Bobby" page:
Bobby is a comprehensive web accessibility software tool designed to help expose and repair barriers to accessibility and encourage compliance with existing accessibility guidelines. … Bobby is designed for developers to test web pages and generate summary reports highlighting the most critical issues effecting site accessibility before posting to the Web or to

Case Study Topic #2: Selecting chief source of information and transcribing title and statement of responsibility.

Discussion Questions:
1. What is the best choice for chief source of information and title proper for each of the resources below (2A-2E)?
2. What would you have in your bibliographic record for:
   - 245 title and statement of responsibility
   - 246 variant forms of title
   - 500 source of title note
3. Taking into account the changing nature of integrating resources, when might catalogers choose not to transcribe other title information after the title proper?
4. Are there cases in which an institution name that appears as a graphic or logo be transcribed as a statement of responsibility if not taken as title proper?

Resource 2A

Resource 2B

Resource 2C (screen shot 1)

(2C - screen shot 2) Hold cursor of "Welcome" (English) and you see this:

The title in the title screen appears only when the user holds their cursor over the word "Welcome"; parallel titles in the other languages appears when the cursor is

(2C - **screen shot 3**) Click on Welcome and you go to this page:

Resource 2D

How To Plan an ALCTS Program - Microsoft Internet Explorer

File   Edit   View   Favorites   Tools   Help   Address http://www.ala.org/alcts/programs/plan/index.htm   Go

ALCTS Association for Library Collections & Technical Services
A Division of the American Library Association

How To Plan an ALCTS Program

Programs

- Program Planning
- Developing a Program
- What You Need To Know
  - o Detailed
  - o Condensed
  - o Calendar
  - o Planning Group
- The Basics
  - o The Form
  - o The Instructions
  - o ALA

Welcome to the ALCTS program planning web page. Everything you need to develop and plan a successful ALCTS program is here. The most important aspect of planning a program is the idea. If you have a good idea, then moving you through the process of getting a program presented is relatively easy. Help exists along the way. Don't be afraid to ask. The ALCTS Program Committee and the ALCTS Office staff provide valuable assistance turning your idea into reality.

Start to Finish - Forms, Forms, and More Forms

Filling out forms is a necessary (and time consuming) part of the program planning process. These forms provide the program committee and the office all the information needed to review, approve, and then ensure your program is a success. This step-by-step guide is intended to help alleviate (hopefully) the anxiety of the planning process. The ALCTS program planning process has been, in the past, pronounced only slightly less intimidating that filling out your federal income tax return. Hope this guide helps you navigate the morass.

Time to bask in the glory of your triumph! Good job!
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Last Modified: Tuesday, May 14, 2002 kka

Resource 2E:

Case Study Topic #3: Ascertaining and recording publisher, place, and dates of publication.

Discussion Questions:
1. What is the place of publication and publisher name for each of the following two resources (3A-B)?
2. What are the dates of publication of each?
3. What would you have in a MARC record for fields 260 and, if applicable, 362 1, for these resources?
4. Is "hosting" a web site the same thing as "publishing" it?

Resource 3A (screen shot 1)

Resource 3A (screen shot 2)

CAST researchers and Web consultants developed the first version of Bobby in just over three months, releasing it in September 1996.

Resource 3A (screen shot 3)

© 1999-2000 CAST, 30 Cross Street Peabody MA 01900

Resource 3B (screen shot 1)
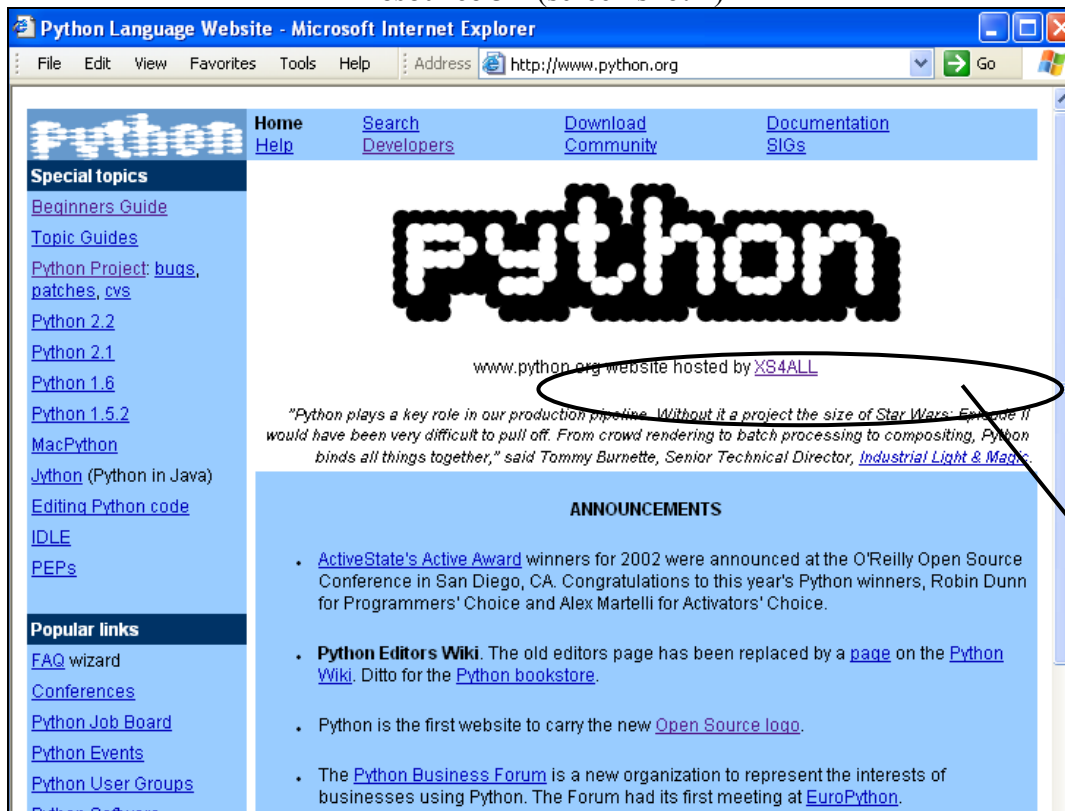
[no further information appears at bottom of home page screen, FAQ, or other likely sources investigated] **Resource 3B** (screen shot 2)
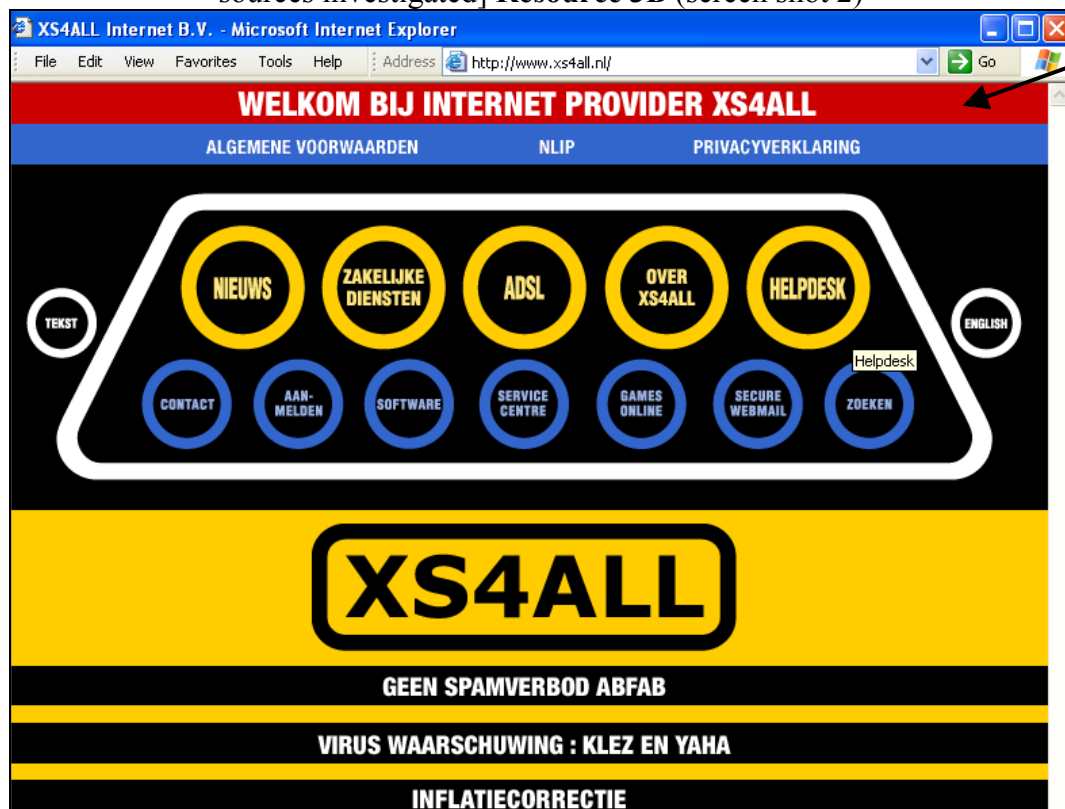
Resource 3B (screen shot 3)
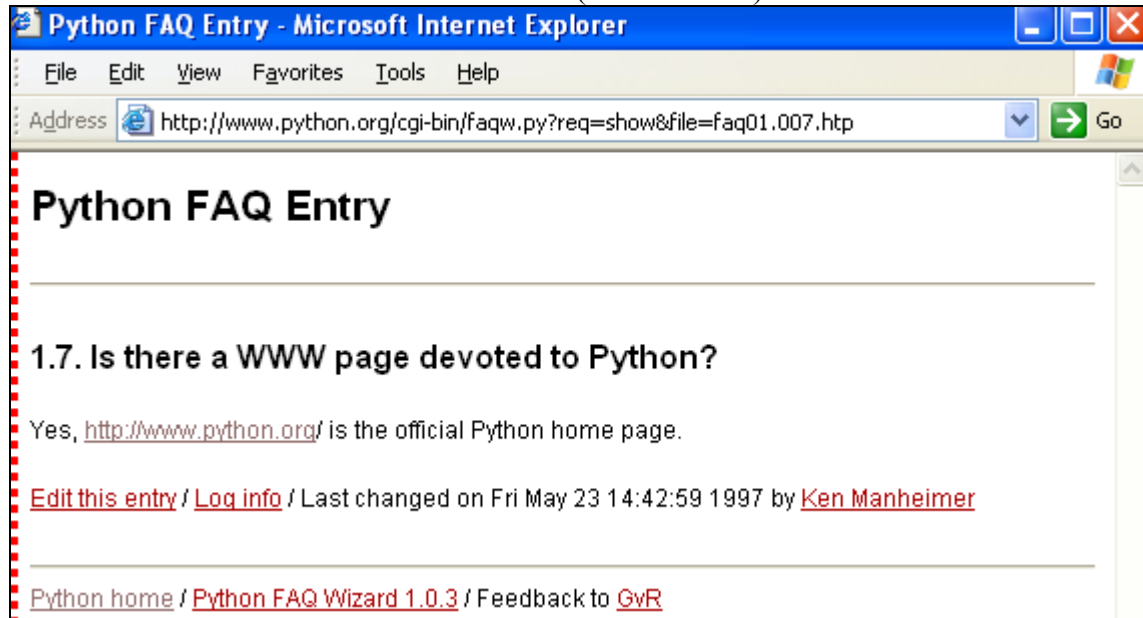
Case Study Topic #4: Creating and updating records for changing content.

Discussion Questions for Resource 4A (Mapquest):

1. How would you record the title proper and other title information for each iteration of the Mapquest Web site represented below?
2. Would knowing the frequency of changes for this title and other title information influence how you transcribe the title proper and especially other title information?
3. At what point might you use a 547 title complexity note instead of multiple 247s?

Resource 4A ("Mapquest" Web site):

Jan. 11, 1998:

Nov. 10, 1999:

May 10, 2000:

Oct. 1, 2000:
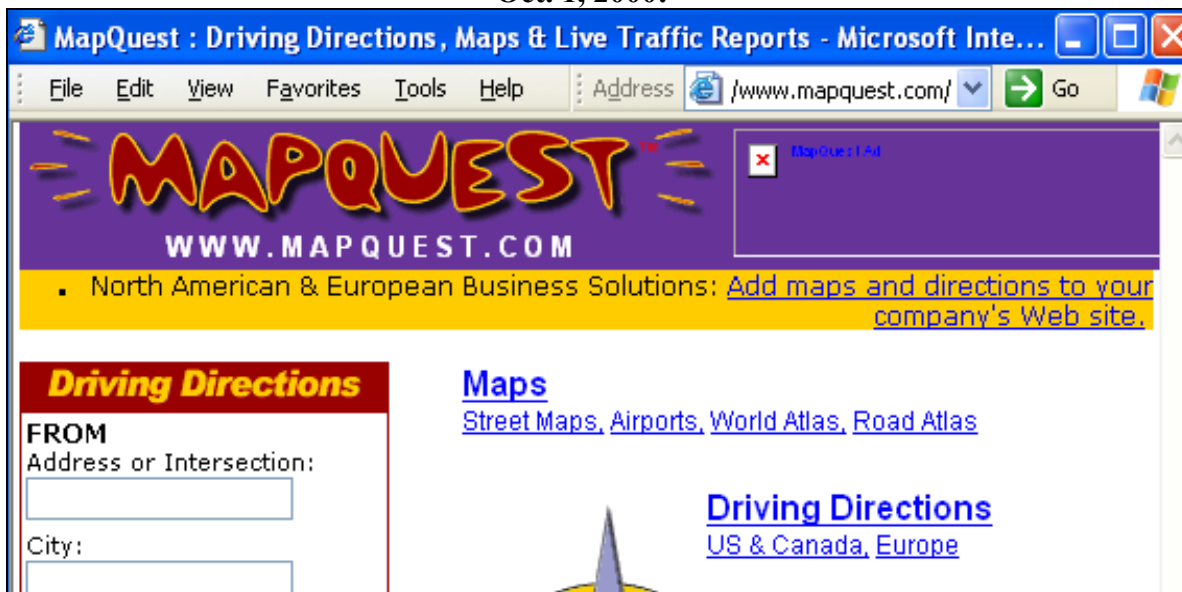
Oct. 12, 2001:

Dec. 2, 2002:

Discussion questions for Resource 4B (White House):

- Look at the four selected iterations of this Web site home page represented below.
1. Knowing that this resource changes fairly radically every 4-8 years, how would this influence your original cataloging of the site as a whole? Think especially of what you would do, or not do, with the following:
     - 520 summary note
     - 505 formatted contents note
     - 6XX subject headings
     - 7xx personal and corporate name entries
2. Are there other cataloging issues you can think of that might arise from this type of Web site?

Resource 4B: Dec. 1, 1998:
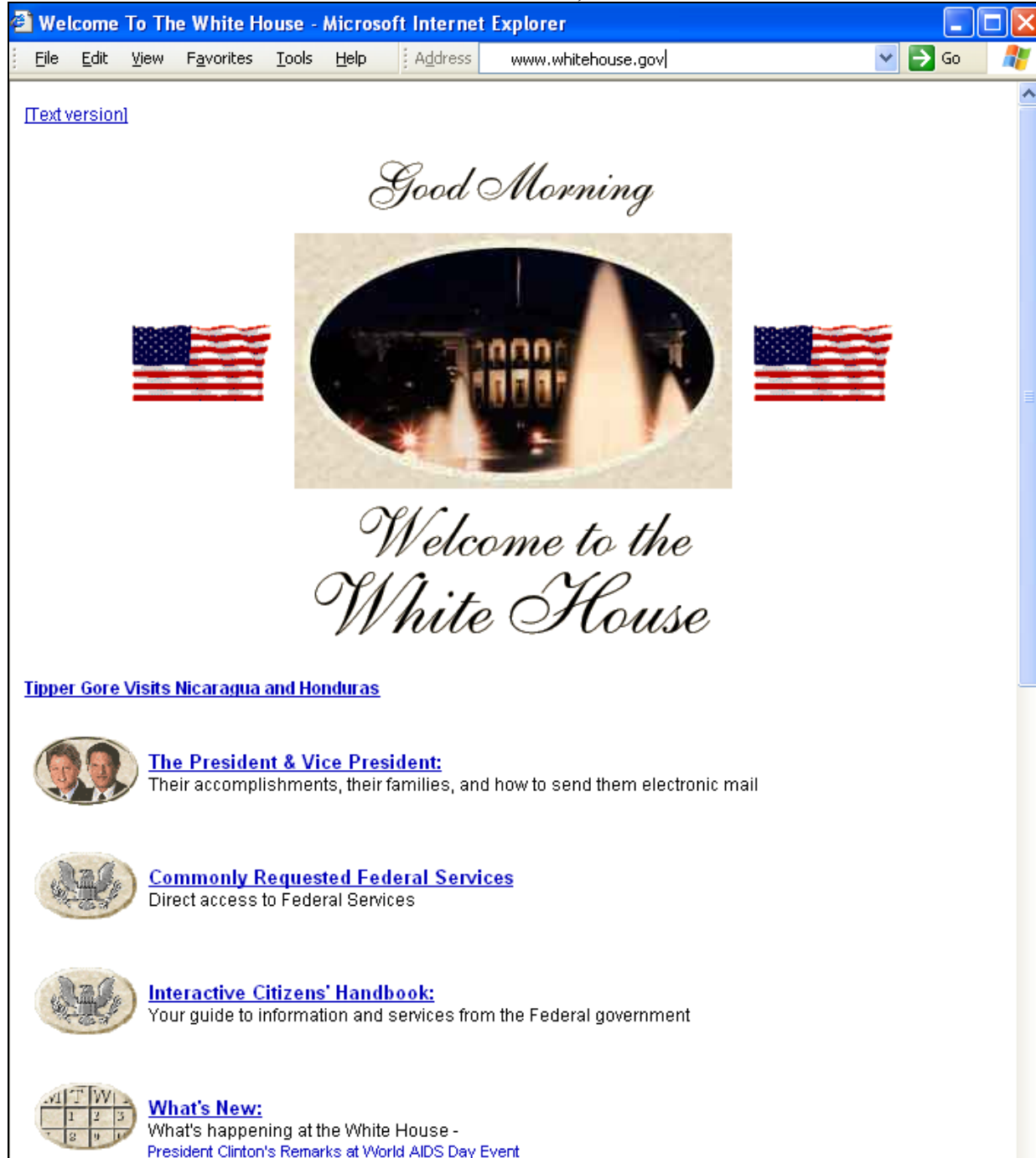
Jan. 18, 2001:

Feb. 2, 2001:

Aug. 4, 2002:

Session 6 Cataloging Updating Loose-Leafs: Special Challenges and Issues

Session 6

Cataloging Updating Loose-leafs and Loose-leaf Services:
Special Challenges and Issues

Original content by
Rhonda K. Lawrence
Head of Cataloging, UCLA Law Library

Goals of Session 6

- Learn the new rules for cataloging loose-leaf services
- Explore a few of the special challenges and issues involved in the cataloging of loose-leaf integrating resources

2

Bibliographic Resources:
Type of Issuance
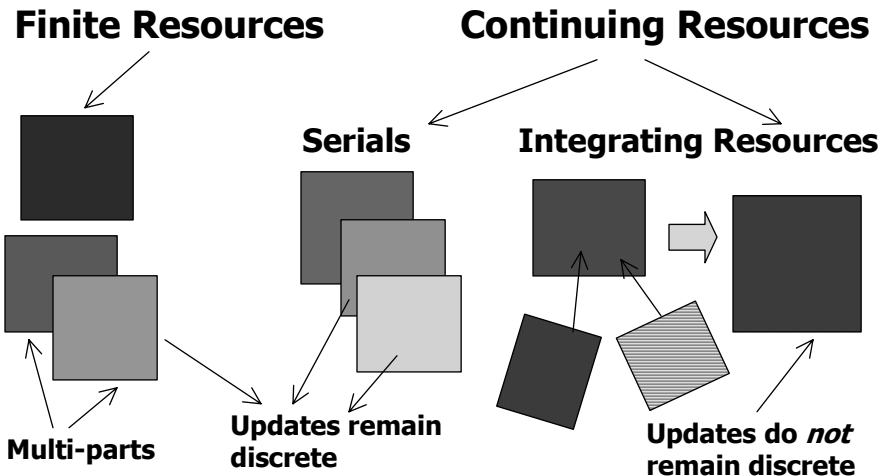
Finite Resources   **Continuing Resources**

Serials   **Integrating Resources**

Multi-parts   **Updates remain discrete**   **Updates do *not* remain discrete**

The Updating Loose-leaf

- An integrating resource that consists of one or more base volumes updated by separate pages that are inserted, removed, and/or substituted.
  - *AACR2 2002 Revision Appendix D*

- "A type of publication consisting of unbound pages housed in a ring or rod binder, a format which easily permits the addition, substitution, or removal of pages."
  - *Cataloging Legal Literature,* Lembke & Lawrence. 3rd ed. 1997.

4

Critical Questions

- Is the item
  - An updating loose-leaf?
  - A new iteration?
  Or
  - A new edition?

5

Decision One

- Determine the type of issuance for the resource in loose-leaf format
  - A serial
  - A monograph
  - An integrating resource; that is, an updating loose-leaf

6

Loose-leaf as a Serial

- Loose-leaf format does **not** equal an integrating resource
- LCRI 1.0--catalog as a serial when resource:
  - Meets definition of a serial even though housed in a binder
  - Issues remain discrete
  - Binders issued successively even if contents interfiled
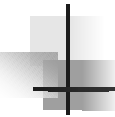
7

Loose-leaf as Monograph

- LCRI 1.0--catalog as a monograph when:
  - Resource complete as issued or;
  - Intended to be complete in finite number of parts

8

Loose-leaf as Integrating Resource

- LCRI 1.0--catalog as updating loose-leaf :
  - When resource consists of binder or binders in which pages are
    - Added
    - Removed
    - Replaced
  - Until next edition is published or until complete

9

Identifying an Updating Loose-leaf

- Examine the evidence
  - Prefatory material
  - Release dates
  - Filing instructions
  - Publishers' invoices
  - Records in shared databases (e.g., OCLC)
  - Earlier editions

10

Decision Two

Is the item:

- A new iteration?

Or …

- A new edition?
- General assumption: New iteration

11

More Rare: the New Edition

- Begin with new set of assumptions: in case of doubt, treat as in iteration

- New bibliographic record created only for certain changes in edition, mergers, splits, or when there is a new work

12

What do I do when ...

Condition		Action
Original author dies	?	Update record
Main entry changes	?	Update record
New authors appear	?	Update record
Title changes	?	Update record

13

What do I do when ...

Condition		Action
Place changes	?	Update record
Publisher changes	?	Update record
Size of volumes changes	?	Update record
Updating frequency changes	?	Update record

14

What do I do when …

Condition	Action
All elements change except edition statement	? Update record
Edition statement changes	? Depends:
➢ Gradual replacement	➢ Update record
➢ Complete new ed.	➢ Close old and create new record
All contents replaced	? Close old and create new record

15

Loose-leaf Services

- **Definition** per LCRI 12.0
  - A publication issued in several component parts
  - Often includes updating loose-leaf and bound volumes containing primary and secondary source material
  - Sometimes called a reporter

16

Loose-leaf Services Treatment

- **Treatment** (LC practice per LCRI 12.0)
  - Create one record for the service as a whole
  - Consider the service as a whole to be an integrating resource.
  - In a note, list the component parts in enough detail to identify them. Give any volume designation that is found on a part.
  - Optionally, include numeric or chronological designations of newsletters, bulletins, etc., within the service

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Treatment Examples

- **500**   The reporter contains binders: Current developments; Monographs; State solid waste--Land use; Federal laws; Federal regulations; State water laws; State air laws; Mining; Decisions (later published in bound volumes as Environment reporter. Cases).

- **500**   The service is divided into five parts: Treatise / by Jacob Mertens, Jr. and others (v., loose-leaf); Code, current volume (loose-leaf) and bound volumes, 1954-1958-; Code commentary (v., loose-leaf); Regulations, current volume (loose-leaf) and bound volumes, 1954-1960- ; Rulings, current volume (loose-leaf) and bound volumes, 1954-1957-

- **500**   Library of Congress lacks section: Mining. $5 DLC

18

Loose-leaf Services

Pamphlets and paperbacks

- Current information of temporary or permanent value published also in pamphlet or paperback form
- Keyed to a section or a service or to several services
- Characteristics:
  - individual, distinctive titles
  - carry title of the service
  - numbering of a section of the service
  - usually a supplementary bulletin with the words "Extra," "Section 2," etc.

19

Pamphlets/paperbacks series authority record example

Series authority record:

130 _0   Tax ideas. $p Bulletin

667   A separately numbered section of the loose-leaf service "Tax ideas." Bulletins issued in loose-leaf format are filed as a section of the parent loose-leaf. Catalog separately any material published in pamphlet or paperback form that carries the additional designation "Section 2;" do not indicate a relationship to the parent loose-leaf and do not give an added entry for the parent loose-leaf.

20

Loose-leaf Services

Bulletins, newsletters, etc.

- Sections with independent numeric or chronological designations
- Contain latest developments in a particular field
- Information of permanent value often later included in main text

21

Loose-leaf Services

LC practice for bulletins

- Do not create a separate record
- On record for updating loose-leaf, give a note
  - **500**   Includes separately numbered section: Report bulletin.
  - **500**   Includes separately numbered bulletin: Criminal law advocacy reporter.
- Make appropriate added entry

22

Loose-leaf Services

Transfer volumes

- Bibliographic unit containing material of a permanent nature originally issued as a section of a loose-leaf service
- Material transferred from the loose-leaf service by one of the following modes:
  - Reissued by the publisher in bound form *or*
  - Transferred to permanent binders *or*
  - Bound separately by the subscriber

23

Loose-leaf Services

LC practice for transfer volumes

- Do not create a separate bibliographic record for transfer material
- On record for the updating loose-leaf, give a note
- If the transfer section has a title of its own, cite the title in the note and give an added entry

24

Loose-leaf Services

Physical description of transfer volumes (LCRI 12.5B1)

- Do not give number of transfer volumes for loose-leaf still in progress

    300    $a v. (loose-leaf), v. (transfer)

- Give number of transfer volumes for completed loose-leaf

    300    $a 2 v. (loose-leaf), 4 v. (transfer)

25

Loose-leaf Services

Sample notes for transfer volumes

- **500**   Material of permanent value is removed periodically and bound in separate volume.
- **500**   Material of permanent value is transferred from time to time to storage binders.
- **500**   Prebound, separately numbered volumes with title Administrative law decisions, containing reports of decisions of the Administrative Appeals Tribunal, periodically replace the reports and decisions in the section entitled Administrative law decisions.

26

Loose-leaf Services

- If a separate bibliographic record is created for transfer material, include a note explaining the relationship

  245 00 Environment reporter. $p Cases.

  500 These volumes replace the opinions published in loose-leaf format in the "Decisions" binder of Environment reporter.

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Session 7 Selection of Online Resources and Options for Providing Access

Session 7

Selection of Online Resources
and
Options for Providing Access

Session 7: Selection of Web Resources for Cataloging

- How do libraries decide which online integrating resources to catalog?

- What are some common criteria used to select no-fee Web sites for inclusion in the OPAC?

- What are alternative methods of resource description for free Web sites and local digital collections?

- Who makes selection and cataloging decisions?

2

Discussion Questions: Current Local Practice

- What kinds of online resources does your institution catalog?
  - Does this include integrating resources (updating Web sites and online databases)?

- Who makes the selection decisions?

- Using what criteria, established by whom?

- Where do the records reside?

- What metadata and/or cataloging standards are used?
  - If using non-MARC metadata for digital collections or selected Web resources, who creates this metadata?

3

Discussion Group Objectives (1)

1. Develop a set of categories into which we can group online resources to help institutions make selection decisions

2. Develop a list of alternatives for who could and should make selection decisions for online resources within an institution (individuals, groups, teams)

3. Develop a list of advantages and disadvantages to providing access to no-fee Web resources via the library OPAC vs. the library Web site

4

Discussion Group Objectives (2)
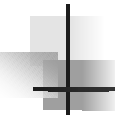
4. Develop a set of common selection criteria for online resources to be cataloged using AACR and MARC
   - Focus on the selection of freely-available Web resources rather than fee-based, licensed resources
   - Focus on a particular type of institution if you wish, or develop broad criteria potentially applicable to many types of institutions

5. Develop a list of some primary alternatives for providing access to Web resources selected by a library
   - Are there other options in addition to the OPAC and Web site?
   - Include some alternative resource description (metadata) standards beside AACR2 and MARC and issues involved with using them.

5

Categories of online resources

6

Who should make selection decisions?

7

Selection criteria for free Web sites to be cataloged

8

Access via OPAC vs. Web site: advantages and disadvantages

9

Alternatives to the OPAC and Web site

10
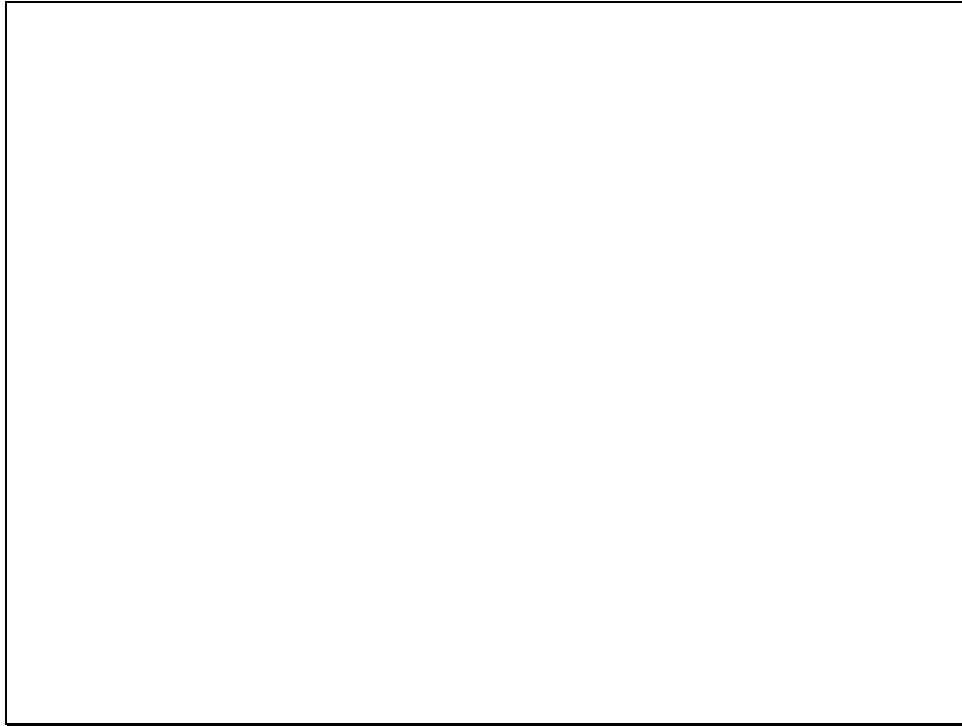
Categories of Online Resources

- Resources the library purchases or licenses
  - E.g., e-journals, e-books, online indexes and databases

- Online resources the library or local institution "publishes"
  - Local Web sites
  - Local digital collections
    - Results of digitization projects (text, images, sound, video, etc.)
    - Item-level records or collection-level records or both

- Freely-available online resources
  - i.e., non-local, no-fee online resources
  - "Third-party Internet resources that the library neither purchases nor licenses" (Childress)

12

Who Makes Selection Decisions?

- Catalogers
- Subject specialists
- Bibliographers
- Reference librarians
- Cross-functional teams
  - E.g., collection management, public services, technical services.
- User community requests
  - Public, faculty, staff, students, special library clientele, etc.
- Others?

13

Selection Criteria

- General considerations:
  - Fee-based resources vs. no-fee resources
  - Use same general criteria as for print and other tangible resources
  - Include in library's written collection development policy

14

Some Common Selection Criteria for Free Web Sites (1)

- The Web site should not be just a list of links to other Web sites:
  - e.g., the Web site should be a searchable database with direct access to the information; not just a link out to the information
- Should be relevant to the information needs of the library's patrons
- Should complement or enhance the information already available on the library's Web page or collection
- Should provide credible and accurate information
- Should be "user-friendly"
- The author or source of the material should be an authority on the subject
- The site should have favorable reviews

15

Some Common Selection Criteria for Free Web Sites (2)

- The site should be set up in a logical, systematic way, such that a novice Internet user will be able to easily access and use it
- Permanence of site
- The site should be stable, with infrequent down times
- The site should adhere to a policy of periodic review and updating of content
- The site should state a policy for inclusion or exclusion of information
- Web sites should be checked on a regular basis: delete sites that no longer exist or no longer meet the majority of selection requirements

[This list taken from **Robert McWilliam**, "Web site selection and related cataloguing issues," a message to the Autocat online discussion list, Sunday, July 21, 2002]

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Alternative selection approaches

- "Vertical file" collection approach
  - Consider print and other "standard" resources as primary, all are cataloged in OPAC
  - Collect and catalog Web resources to supplement primary collection, much as vertical file collections do
  - Could include cataloging Internet supplements to library's primary, mostly hard copy resources
- Gift materials collection approach
  - Regard freely-available Internet resource similar to a large donation of gift materials
  - Selectively add only some
  - Adopt aggressive weeding/replacement policy

Taken from Eric Childress, "Perfect in So Many Ways", *Journal of Internet Cataloging* 5(2) 2002, p. 24

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Options for providing access to free Web resources

1. Library online catalog (OPAC)
   - Full-level AACR/MARC records
   - Less-than-full-level records
2. Library Web site / subject gateway
   - List of links / subject 'pathfinder' with or without descriptions/annotations
3. Separate database
   - Surrogate records created according to Dublin Core or other content standard

What are some advantages and disadvantages of each option?

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Access via library online catalog (1)

- Some possible advantages:
  - Provides integration with other resources and a "one-stop shopping" for users
    - Patron needs to search only one source (the OPAC)
  - Integrates online resources with others on same subject, by same person, etc.
  - Allows searching by controlled access points
    - Includes searching by LC subject headings
  - Keyword access also available within catalog database
  - URLs may be regularly checked and maintained
  - Makes use of the existing library system, avoiding development costs of separate database
  - Electronic resources enhance the library's "collection"

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Access via library online catalog (2)

- Some possible disadvantages:
  - Increased workload for tech services staff
    - Add selected Web resources on top of tangible resources needing to be cataloged
    - Could develop growing backlog of uncataloged resources
  - Link checking and URL maintenance
  - How many patrons will use the catalog to find Web resources?
  - Duplication of effort if list of resources on library Web page / subject gateway is also maintained by public services staff

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Access via library Web site/gateway

- Some possible advantages:
  - Less burden on cataloging staff
  - Potentially less time-intensive than creating AACR/MARC records
- Some possible disadvantages:
  - Requires the patron to look in two different places: library's Web site and OPAC
  - No authority-controlled access point searching, especially subject headings
  - Potentially more intensive maintenance needed since there may be no automated report of "broken" URLs

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Access via both OPAC and Web site

- Combination of above
  - Potential advantage:
    - Users can find Internet resources in two ways: either through the catalog or via subject gateways
    - Access can be both/and rather than either/or
  - Potential disadvantage:
    - Duplication of effort if list of resources on library Web page / subject gateway is also maintained by public services staff

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Access via separate database

- May use non-MARC, Dublin Core, or other simpler kinds of metadata / records

- Issues may include:
  - Content standard
  - Encoding standard
  - Database searchability / access points / indexing

- Advantages?
- Disadvantages?

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Alternative Standards to AACR/MARC

- Dublin Core
- VRA Core Categories
- EAD (Encoded Archival Description)
- TEI (Text Encoding Initiative)
- Other?

- Issues with using alternative metadata standards for resource discovery
  - content standards (set of metadata elements)
  - encoding standards (machine-readability)
  - information retrieval systems (able to read and use the metadata)

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Acknowledgments

- Many of the categories and criteria in this set of slides come from the following sources:
  - Eric Childress (OCLC) with Eric Jul (OCLC):
    - Article in *Journal of Internet Cataloging* Vol. 5(2) 2002, p.21-25: "Perfect in so Many Ways"
  - Robert McWilliam (Sault Ste. Marie Public Library, Ontario):
    - Autocat posting, July 21, 2002: "Web site selection and related cataloguing issues"
  - Karen Selden (University of Colorado Law Library):
    - Autocat posting, August 2, 2002: "The Catalog vs. The Homepage: Best Practices in Providing Access to Electronic Resources"

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Additional Resources

- See Bibliography in Appendix E of course materials

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Appendix A: Marc Tagging for Integrating Resources
For General Reference and Use with Workshop Exercises

Contents

MARC 21 Codes for Integrating Resources

Fixed Field Combinations in Integrating Resource Records

Commonly Used Tags in Records for Integrating Resources

Leader/Position 06 *Type of Record*

006 *Fixed-length Data Elements -- Additional Material Characteristics--Computer Files/Electronic Resources*

Data Elements for 006 *Fixed-length Data Elements--Additional Material Characteristics--Continuing Resources* and 008 *Fixed-length Data Elements--Continuing resources*

008 *Control Field -- All Materials* / Position 06 *Type of Date/Publication Status*

007 *Physical description fixed field -- Electronic resource*

Field 246 *Varying form of title* indicators

Selected Linking Entry Fields: Indicators and Subfields

Field 856 *Electronic location and access*

MARC 21 Codes for Integrating Resources

022/222	ISSNs and key-titles can now be given in records for integrating resources (12.8B1, 12.8C1).
247/547	These fields for earlier titles proper will now be used in records for integrating resources (LCRI 12.7B4.1, 12.7B4.2, LCRI 12.7B4.2).
310/321	These fields are now also applicable to frequency notes for updates to integrating resources (12.7B1, LCRI 12.7B1).
362 1	This field is now also applicable to notes for beginning and/or ending publication dates for integrating resources [and multipart items] (1.4F8, 12.7B11.1).
550	This field is now also applicable to issuing body notes for integrating resources (12.7B7.1, 12.7B7.2).
580, 760-787	These fields are now also applicable to reciprocal relationships involving integrating resources (12.7B8, LCRI 12.7B8, LCRI 21.28B1).

Fixed Field Combinations in Integrating Resource Records

Print Integrating resource (Updating loose-leaf)	Leader →	Type = a BLvl = i
	008 →	Continuing resource
Electronic integrating resource (Updating database – Textual)	Leader →	Type = a BLvl = i
	008 →	Continuing resource
	006 →	Electronic resources
	007 →	Electronic resources
Computer file integrating resource (Non-language-based)	Leader →	Type = m BLvl = i
	008 →	Computer file
	006 →	Continuing resource
	007 →	Computer file
Updating cartographic website	Leader →	Type = e Blvl = i
	008 →	Map
	006 →	Continuing resource
	006 →	Computer file
	007 →	Map or Atlas (Optional)
	007 →	Electronic resource

Commonly Used Tags in Records for Integrating Resources
Following is a selected list of MARC tags that are frequently used in electronic integrating resource records. Consult the *MARC 21 Format for Bibliographic Data*, OCLC *Bibliographic Formats and Standards,* and RLIN documentation for a complete list and instructions on their use.

Leader/008	Fixed field display found in workforms on OCLC or local systems
007	Physical description fixed field
010	LC control number
020	ISBN
022	ISSN
050	LC classification number
100	Main entry—personal name
110	Main entry—corporate body
111	Main entry—conference name
130	Main entry—uniform title
222	Key title (assigned in conjunction with ISSN)
245	Title and statement of responsibility
246	Varying form of title (used both for current title variants and for title information other than title proper for former titles, e.g., former parallel title, subtitle, variant title, etc.)
247	Former title proper
250	Edition statement
256	Type and extent of electronic resource (not used in LC original cataloging)
260	Publishing statement
300	Physical description (not used for remote access electronic resources)
310/321	Current and former frequency
362 1	date note used when date information is not recorded in area 4 (260 $c)
440/490	Series statement
538	Mode of access (for electronic resources)
538	System details note (for electronic resources)
500	General note (source of title, item described, all notes with no specific 5XX tag)
516	Type of electronic resource
530	Additional physical form available
546	Language note
547	Former title complexity note
550	Issuing bodies note
580	Linking entry complexity note
6XX	Subject headings

700	Added entry—Personal name
710	Added entry—Corporate body name
730	Added entry—Uniform title
740	Added entry—Uncontrolled related/analytical title
76X-78X	Linking entry fields (prefer using $i for note rather than 530 or 580 when possible)
8XX	Series added entries
856	Electronic location and access

Leader/Position 06 *Type of Record*

Indicates the characteristics of and defines the components of the record.

a Language material	g Projected medium	o Kit
c Notated music	i Nonmusical sound recording	p Mixed material
d Manuscript notated music	j Musical sound recording	r Three-dimensional artifact or naturally occurring object
e Cartographic material	k 2 dimen. nonprojectable graphic	
f Manuscript cartographic material	m Computer file	t Manuscript language material

Additional Guidelines for the exercises

Use value "a" *Language material* for:

• World Wide Web Sites, when the content consists of primarily textual Web pages with incidental images, hypertext links, or search software: ACLU web site

• Collections or databases of textual electronic serials with search software

• Web portal pages consisting of textual links to other resources

• Online bibliographic databases such as library online catalogs

• Numeric data presented in tabular form not manipulable by computer

Use value "m" *Computer file* for the following resources:

• Computer Software, when the resource consists of computer software, including programs, games and fonts.

• Numeric Data, when the resource consists of numeric data such as census or survey data that resides in a database and that is manipulable by computer. [Numeric data presented solely in eye readable, tabular form and that is not manipulable by computer is the equivalent of a text document and is cataloged as language material (Type "a")]

• Computer-Oriented Multimedia, when the resource consists of (1) the combination of two or more media, such as audio, video, images, animation, etc., and (2) no single aspect comprises the significant content.

• Online System or Service, when the resource constitutes an online system or service supports system-based user interaction. The presence of search software or of active hyper-links does not constitute computer programs and do not make resources online systems or services for cataloging purposes. In the area of online systems and services, consider whether the system itself (for example, a library system providing an interface to several databases), or the content of the several constituent databases, is being cataloged. When cataloging the system itself, use "Type" code "m" and "File" code "j".

    Examples of online systems or services include: Online library systems (consisting of a variety of databases), FTP sites, Electronic bulletin boards, Network information centers, Campus-wide information systems, Discussion groups or lists (via "listserv" or newsgroup), News and weather reports with system-based user interaction, Airline reservation systems, and Online stock investment sites.

References:
Guidelines for Coding Electronic Resources in Leader/06. Network Development and MARC Standards Office, Library of Congress.
http://lcweb.loc.gov/marc/ldr06guide.html

Cataloging Electronic Resources: OCLC-MARC Coding Guidelines
http://www.oclc.org/connexion/documentation/type.htm

Examples of types of electronic resources[1]

Example	LDR/06	008/26	006/09

Online Bibliographic Database
    LC-Books file
    Medline
	a		e

Collection of online databases
    MEDLARS
    LOCIS
    LC-MUMS
	m	j	

Web-based computer software *The universal currency converter*	m	b	

CD-ROM of a census with manipulable numeric data (Mono or serial)
    1996 National and state summary data tables ()
    Common core of data (CCD)
	m	a	

Electronic serial with search software *MLA international bibliography*	a		e

Collection of electronic serials with search software
    JSTOR
    Project Muse
	a		d

Electronic journal *American imago*	a		d
CD-ROM of a census in textual form (mono or serial) *County business patterns*	a		d

Online system or service
    Internet Grateful Med
    Airline reservation system
    Online stock investment site
	m	j	

Web site with significant audio and video *CNN Web site*	m	m	
Web "portal page" (Web page with collection of links) *Tools for serials catalogers*	a		d

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[1] Extract from *Guidelines for Coding Electronic Resources in Leader/06*. Network Development and MARC Standards Office, Library of Congress. http://lcweb.loc.gov/marc/ldr06guide.html

006 *Fixed-length Data Elements -- Additional Material Characteristics*
Computer Files/Electronic Resources

006-ER Position	Data element	006-ER Position	Data element
00	Form of material Code "m" is used to identify field 006 as containing coded data elements relating to an electronic resource	05	Target audience
		09	Type of computer file
		11	Government Publication

Target audience (Audn:) (006/05) (Electronic resources, Music, Visual)
A one-character code that indicates the audience for which the item is intended.

#	Unknown or not specified	c	Pre-adolescent	f	Specialized
a	Preschool	d	Adolescent	g	General
b	Primary	e	Adult	j	Juvenile

Type of computer file (File:) (006/09)
A one-character code that indicates the type of computer file described in the bibliographic record.

a	Numeric data	d	Document	i	Interactive multimedia
b	Computer program	e	Bibliographic data	j	Online system or service
a	Representational Pictorial or graphic information that can be manipulated in conjunction with other types of files.	f	Font	m	Combination
		g	Game	u	Unknown
		h	Sound	z	Other

Government Publication (GPub:)   (006/11)
A one-character code that indicates whether an item is published or produced by or for a government agency, and, if so, the jurisdictional level of the agency.

#	Not a government publication	i	International intergovernmental	s	State, provincial, territorial, dependent, etc.
a	Autonomous or semi-autonomous component	l	Local		
		m	Multistate	u	Unknown if item is government publication
c	Multilocal	o	Government publication--level undetermined		
f	Federal/national			z	Other

Data Elements for 006 *Fixed-length Data Elements--Additional Material Characteristics--Continuing Resources* **and 008** *Fixed-length Data Elements-- Continuing resources*

006-CR Position	008-CR Position	Data element	006-CR Position	008-CR Position	Data element
00		Form of material. Code "s" is used to identify field 006 as containing coded data elements relating to a continuing resource	06	23	Form of item
			07	24	Nature of entire work
			08-10	25-27	Nature of contents
01	18	Frequency	11	28	Government publication
02	19	Regularity	12	29	Conference publication
03	20	ISSN Center	13-15	30-32	Undefined
04	21	Type of continuing resource	16	33	Original alphabet/script of title
05	22	Form of original item	17	34	Entry convention
LC Practice: While employing the interim practice of using a combination of fields 008—*Books* and 006—*Continuing resource* on records for integrating resources, code only the following positions in the 006-CR: 006/01 Frequency, 006/04 Type of continuing resource, 006/17 Entry convention, and 006/06 Form of item [only for electronic resources]. Use the fill character for the other positions.					

Frequency (Freq:) (006/01 008/18)
A one-character code that indicates the frequency of an item; used in conjunction with *Regularity*.

#	No determinable frequency (intentionally irregular)	j	Three times a month
a	Annual	k	Continuously updated
b	Bimonthly (Includes 6, 7, or 8 numbers a year)	m	Monthly (Includes 9, 10, 11, or 12 numbers a year)
c	Semiweekly	q	Quarterly (Includes 4 numbers a year)
d	Daily	s	Semimonthly
e	Biweekly	t	Three times a year
f	Semiannual (Includes 2 numbers a year)	u	Unknown
g	Biennial	w	Weekly
h	Triennial	z	Other
i	Three times a week	|	No attempt to code

Regularity (Regl:) (006/02 008/19)
A one-character code that indicates the intended regularity of an item; used in conjunction with *Frequency*.

n	Normalized irregular Predictable irregularity pattern	x	Completely irregular Intentionally irregular or the frequency is expressed on the item as *numbers per year.*
r	Regular		
u	Unknown	|	No attempt to code

Type of continuing resource (SrTp:) (006/04 008/21)
A one-character code that indicates the type of continuing resource.

#	None of the following	m	Monographic series	w	Updating Web site
d	Updating database	n	Newspaper	|	No attempt to code
l	Updating loose-leaf	p	Periodical		

Form of item (Form:) (006/06 008/23)
A one-character code that indicates the form of material for the item being described.

In records for electronic integrating resources which include Field 006—*Continuing resource*, code position 06 *Form of item* with value "s" for "electronic." Make a determination about position 05 *Form of original item* based on the particular resource being cataloged.

Form of original item (Orig:) (006/05 008/22)

A one-character code that indicates the form of material in which an item was originally published.

#	None of the following	c	Microopaque	f	Braille
a	Microfilm	d	Large print	**s**	**Electronic**
b	Microfiche	e	Newspaper format		

Nature of entire work (EntW:) (006/07 008/24) and Nature of contents (Cont:) (006/08-10 008/25-27)

Nature of entire work contains a one-character code that indicates the nature of a resource if it consists entirely of a certain type of material. If more than one code is applicable, this position contains a blank and up to three codes may be recorded in *Nature of contents* to indicate that a resource contains certain types of materials. If fewer than three codes are assigned, the codes are left justified and each unused position contains a blank.

#	No specified nature of contents	h	Biography	q	Filmographies
a	Abstracts/summaries	i	Indexes	r	Directories
b	Bibliographies	k	Discographies	s	Statistics
c	Catalogs	l	Legislation	t	Technical reports
d	Dictionaries	m	Theses	u	Standards/specifications
e	Encyclopedias	n	Subject area literature surveys	v	Legal cases and case notes
f	Handbooks	o	Reviews	w	Law reports and digests
g	Legal articles	p	Programmed texts	z	Treaties

Government Publication (GPub:)   (006/11)

A one-character code that indicates whether an item is published or produced by or for a government agency, and, if so, the jurisdictional level of the agency.

#	Not a government publication	i	International intergovernmental	s	State, provincial, territorial, dependent, etc.
a	Autonomous or semi-autonomous component	l	Local		
		m	Multistate	u	Unknown if item is government publication
c	Multilocal	o	Government publication--level undetermined		
f	Federal/national			z	Other

Conference publication (Conf:) (006/12 008/29)

A one-character code that indicates whether an item consists of the proceedings, reports, or summaries of a conference.

0	Not a conference publication	1	Conference publicaiton			No attempt to code

Original alphabet or script of title (Alph:) (006/16 008/33)

A one-character code that indicates the original alphabet or script of the language of the title on the source item upon which the key title (field 222) is based.

#	No alphabet or script given	e	Chinese	k	Korean
a	Basic Roman	f	Arabic	l	Tamil
b	Extended Roman (Includes diacritics and special characters)	g	Greek	u	Unknown
		h	Hebrew	z	Other (Includes titles that incorporate words from more than one alphabet or script)
c	Cyrillic	i	Thai		

d   Japanese   j   Devanagari

Entry convention (S/L:) (006/17 008/34)

A one-character code that indicates whether an item was cataloged according to successive entry, latest entry or integrated entry cataloging conventions.

0   Successive entry: A new bibliographic record is created each time a title changes or a corporate body used as a main entry or uniform title qualifier changes. The earlier or later title or author/title is recorded in a linking 780/785 field in each record.

1   Latest entry: The item is cataloged under its most recent title or issuing body (pre-AACR cataloging rules). All former titles and/or issuing bodies are given in notes (fields 247, 547, and 550).

2   Integrated entry: A record is cataloged under its latest (most recent) title and/or responsible person or corporate body. It is used for integrating resources and electronic serials that do not retain their earlier titles.

008 *Control Field -- All Materials* / **Position 06** *Type of Date/Publication Status*

Use with BLvl code "i"	c	Continuing resource currently published
	d	Continuing resource ceased publication
	u	Continuing resource status unknown

007 *Physical description fixed field -- Electronic resource*

Commonly used positions			Optional positions (for digitally reformatted materials)		
007-ER Position	OCLC Subfield	Data element	007-ER Position	OCLC Subfield	Data element
00	$a	Category of material	06-08	$g	Image bit depth
01	$b	Specific material designation	09	$h	File formats
03	$d	Color	10	$i	Quality assurance target(s)
04	$e	Dimensions	11	$j	Antecedent/Source
05	$f	Sound	12	$k	Level of compression
			13	$l	Reformatting quality

007/00 (OCLC $a) *Category of material*

Code 'c' for *Electronic resource* is used for all electronic resources (i.e., both programs, data files, etc.), which consist of digitized machine-readable data, program code, etc. intended to be accessed, processed, or executed by a computer.

007/01 (OCLC $b) *Specific material designation [SMD]*
Indicates the class of material (usually the class of physical object) to which an item belongs (e.g., a magnetic disk).

Code 'r' for *remote* is used for remote access electronic resources.

007/03 (OCLC $d) *Color*

a	One color	g	Gray scale	u	Unknown
b	Black and white	**m**	**Mixed**	z	Other
c	Multicolored	n	Not applicable	|	No attempt to code

Use code "m" for Web pages and sites with mixtures of text and images in B&W, gray scale, and color. Use "c" for colored images (digitized color photos, etc.). Use the fill character if no attempt is made to code the position.

007/05 (OCLC $f) *Sound*

#	No sound (silent)	u	Unknown
a	Sound	|	No attempt to code

Use code "a" if the online resource includes digitally encoded sound. Use blank if it does not. Use "u" if unknown or not feasible to explore entire Web site or database for possible presence of sound files. Use the fill character if no attempt is made to code the position.

Field 246 *Varying form of title* **indicators**

Type of variant title	1st ind. Title added entry	2nd ind. Display constant	$i usage
Alternate form of word, etc. in 245 or other source	3	#	
At head of title	1	#	$i
Corrected form of title (when sic or i.e. used in 245)	3	#	
Other title information from 245	3	0	
Other title information from source other than 245 (source supplied by cataloger in subfield $i)	1	#	$i
Parallel title from 245	3	1	
Portion of title proper from 245: • Portion of title proper, exclusive of an alternative title • Portion of title proper that is an alternative title • Portion of title proper that is a part title or section title • Portion of title proper, exclusive of introductory terms, etc. • Portion of title proper that is emphasized by typography or other similar conditions	3	0	
Any other condition not covered by one of the categories above, including former subtitles of previous iterations	1	#	$i

Selected Linking Entry Fields: Indicators and Subfields

Indicators

First indicator for all linking fields:

0 Display note   1 Do not display note
                          (When subfield $i *Display text* or field 580 *Linking entry complexity note* are used)

Second indicator for selected linking fields:

Tag	Link	Second Indicator (Display constant)	
770	Supplement/Special issue	# Has supplement	8 No display constant generated
772	Supplement parent entry	# Supplement to	8 No display constant generated
775	Other edition entry	# Other edition available	8 No display constant generated

776	Additional physical form entry	# Available in another form	8 No display constant generated
780	Preceding entry	0 Continues 1 Continues in part 2 Supersedes [pre-AACR2] 3 Supersedes in part [pre-AACR2]	4 Formed by the union of … and … * 5 Absorbed 6 Absorbed in part 7 Separated from
785	Succeeding entry	0 Continued by 1 Continued in part by 2 Superseded by [pre-AACR2] 3 Superseded in part by [pre-AACR2] 4 Absorbed by	5 Absorbed in part by 6 Split into … and … * 7 Merged with … to form … * 8 Changed back to [pre-AACR2]
787	Nonspecific relationship entry	# Related item	8 No display constant generated
		* Requires subfield $i *Display text* or field 580 *Linking entry complexity note*	

Field 856 *Electronic location and access*

Indicators

First indicator: Access method

#	No information provided
0	Email
1	FTP
2	Remote login (Telnet)
3	Dial-up
4	**HTTP**
7	Method specified in subfield $2

Second indicator: Relationship

#	No information provided
0	**Resource**
1	Version of resource
2	Related resource
8	No display constant generated

Subfields

a	Host name	k	Password	t	Terminal emulation
b	Access number	l	Logon	**u**	**Uniform Resource Identifier**
c	Compression information	m	Contact for access assistance	v	Hours access method available
d	Path	n	Name of host location in subfield $a	w	Record control number
f	Electronic name	o	Operating system	x	Nonpublic note
g	Uniform Resource Name [obsolete]	p	Port	y	Link text

h	Processor of request	q	Electronic format type	**z**	**Public note**
i	Instruction	r	Settings	2	Access method
j	BPS	s	File size	**3**	**Materials specified**

Diacritics and special characters in URLs

Substitute hexadecimal notation for diacritics and special characters in Uniform Resource Identifiers. When recording a URI in subfield $u, replace the following diacritics and special characters with their hexadecimal notation equivalents (i.e., the hexadecimal value for the diacritic and special character preceded by the percent (%) sign). The spacing underscore (_) is replaced by **%5F** and the spacing tilde (~) is replaced by **%7E**.

Appendix B: Answers to Exercises

Session 1 Exercises – Answers

Resource A:
> • A monograph. This is an electronic book available from netLibrary. This is an online version of its print counterpart. The content of the book does not change over time.

Resource B:
> • An integrating resource. This particular integrating resource appears to be finite rather than
> continuing, in that updates appear to have ceased. (Note the "Last Modified" date at the bottom of the home page screen.)

Resource C:
> • A serial. Besides its title and other evidence from the home page, the second screen shot shows that it has numbered issues that remain as "discrete parts" available online. This is also an online version of its print counterpart.

Resource D:
> • Probably an integrating resource, but possibly a serial. Note the statement of regular updating. If the updates, which bear unique designations, remain available as "discrete parts" and do not get integrated into the whole, then this resource would be a serial rather than an integrating resource.

Resource E:
> • A monograph. This is an online document that goes through different versions over time, but even though the most recent version is said to "replace" the previous version, each earlier version or edition remains discrete and accessible at its own unique electronic location (URL). The changes are not integrated into the single resource.

Resource F:
> • An integrating resource. This is an online document that is updated over time, and the updates are integrated into the existing resource, namely, the same title located at the same electronic address (URL). Previous iterations do not remain discrete parts at separate URLs that can continue to be accessed.

Resource G:
> • An integrating resource. This is an updating Web site.

Resource H:
> • An integrating resource. This is an updating database.

Resource I:
- An integrating resource. This is an updating loose- leaf.

Session 2 Exercise Answers

Exercise 1: Record for the Genome Database

```
Type: a      ELvl: I     Srce: d     GPub: s     Ctrl:        Lang: eng
BLvl: i      Form: s     Conf: 0     Freq: u     MRec:        Ctry: onc
S/L:  2      Orig: s     EntW:       Regl: u     Alph:
Desc: a      SrTp: d     Cont:       DtSt: c     Dates: 1996,9999

006     m d s
007     c $b r $d m $e n
090     QH431
245 04 The genome database $h [electronic resource] : $b GDB.
246 30 GDB
260     Toronto : $b Hospital for Sick Children ; $a Baltimore :
  $b Johns Hopkins University School of Medicine
362 1  Began in 1996?
538     Mode of access: World Wide Web.
500     Title from home page (viewed on Dec. 2, 2002).
500     "An international collaboration in support of the Human
  Genome Project."
520     The GDB stores and curates data generated worldwide by
  those researchers engaged in the mapping effort of the Human
  Genome Project (HGP). Database can be searched by keyword, name
  or accession number, gene name or symbol, query forms, and map
  location. A link also facilitates the insertion or editing of
  data. Reports, statistics, and documentation for developers are
  available via additional links.
610 20 Human Genome Project.
650 _0 Human gene mapping $v Databases.
650 _0 Human genome $v Databases.
710 2_ Human Genome Project.
710 2_ Hospital for Sick Children.
710 2_ Johns Hopkins University. $b School of Medicine.
856 40 $u http://www.gdbwww.gdb.org/
```

Menomic display of 006 fields:

> **006 for Computer files/Electronic resources:**
>
> Audn: **File: d**   GPub: s

Possible date alternatives: *Possible fixed field (Leader/008) alternative:*

```
260 $c [1996?]-
260 $c [199-]-                  Type: m
362 1 Began ca. 1996.           File: m
362 1 Began in 1990s.
362 1 Began between 1990 and
2003.
Dates: 199u,9999
```

Notes on Exercise 1 Record:

The first box above illustrates record as it would appear in final display in OCLC, with the 006 fields in their native character string format. The box below shows the 006 field in its mnemonic label display so that the values can be more easily read and understood.

Very important: not all catalogers will necessarily complete all of the details of the record in exactly the same way! Some variations in details are acceptable and to be expected.

Things to notice in the record: The elements set in bold type face:

- Type = a / language material
    - It is possible that some might have selected the computer file workform instead; if so, we can discuss this; this topic is taken up again in more detail in Case Study Topic #1 in Session 5A.
- BLvl = i / integrating resource
- Date Type / Publication Status = c / currently published
    - Date 1 = 1996, to agree with the 362 1 note on the next screen; this presumes that the cataloger has decided to take 1996 as an approximate or probable beginning date of publication; but 199u could be equally legitimate here if the cataloger has recorded a different date in the 362 1 note
    - Date 2 must always be 9999 for an ongoing resource
    - Freq and Regl = u and u (frequency of updates is unknown [alternative could possibly be: blank and x, if known to be updated frequently but irregularly]
    - SrTp (Type of continuing resource) = d / updating database
    - Form and Original form = s / electronic
    - S/L (Entry convention) = 2 / integrating entry

- Computer files/Electronic resources 006 must be added to code the record for the electronic aspects [makes it searchable by computer file qualifier in OCLC, WorldCat, and in many local catalog systems]
    - File = d / document – since the content of the database has been judged to consist primarily of textual documents [this too might be legitimately debated by some workshop participants]

- 007 contains the most common values for the vast majority of Web sites and online databases

- 090 is an LC-type classification number that could be used for this database, providing a another method of subject arrangement and access

- 245: The first title display on the home page has been selected as the chief source of information, and the "subtitle" chosen to be recorded as such.
    - The genome database is really the only feasible selection for title proper since it (a) provides the fuller form, (b) is the spelled out form of the acronym GDB, (c) is identical in both the first title display and the HTML header displayed in the browser title bar.
    - It is possible that some catalogers might transcribe the following as other title information (subtitle): "An international collaboration in support of the Human Genome Project." In this example it has been given in a quoted 500 note instead of taken as other title information for transcription.

- 246: GDB should be given as a variant form of title for at least two reasons, (a) it appears as a logo displayed prominently on the home page, which may be taken as a formal title display, (b) it is a form of the title of the database commonly-used throughout the resource.

- 260: The two main institutions responsible for the database being published online have been given; one could argue for one or the other alone, but here both are given since they appear to bear fairly equal responsibility for making the resource available online.
    - Since no beginning date of publication was stated explicitly anywhere with the resource, this record is following the primary AACR rule and the LCRI to omit it from Area 4 (260 $c). If following the AACR option, one could give either [199-]- or [1996?]- in 260 $c.
- 362 1: this record has an approximate, probable date of publication stated in this publication note, the question mark indicating its probability rather than certainty. This also could be debated, the note worded differently, or omitted altogether depending on cataloger judgment and whether or not the option in AACR2 1.4F is applied.

- 538: the standard Mode of access note must be given and is normally the first note in the record.
- 500: the source of title and item described notes must be given; they do not have to be combined, but this record has done that, as is the more common practice.
    - "Home page" is the term selected here, but other terms are also legitimate, such as "title screen", etc. And you could also have selected HTML header or title bar if they chose that as the chief source.
    - The date viewed will always be the date actually viewed and cataloged.
- 520: This record also includes a 520 summary description note, which you probably have not composed, but you would want in an actual record.

- 6XX: subject headings; the first is the name of the project itself.
    - The use of the subdivision Databases could be debated based on its current definition in the LC Subject Cataloging Manual. But it has been chosen for use here.

- 7XX: added entries: the name of the project again and of both publishers have been given as corporate name added entries. Giving the names of publishers of Web sites and databases as added entries is very common since they often bear general responsibility for the intellectual content of the resources as well as "publishing" it on the Internet. The lines between creator and publisher are frequently blurred on the Internet.
    - This is not dissimilar to motion picture and videorecording cataloging where responsibility is diffuse and shared among many individuals and corporate bodies, and where corporate bodies may be regarded as both publishers and 'authors' of the content.

- 856: the electronic location / address of the database.
    - This must be the URL for the home page of the database, at the highest granular level of the resource, since the database as a whole has been selected to be cataloged and not some sub-portion of it.

Exercise 2: Record for National Weather Service

If Type "m" selected:

```
Type: m     ELvl: I     Srce: d     Audn:       Ctrl:       Lang: eng
BLvl: i     File: j     GPub: f     MRec:                   Ctry: mdu
Desc: a                 DtSt: c     Dates: 1995,9999


006     skr wss f0  2
007     c $b r $d m $e n
007     a $b j $d c $e z $f n $g z $h n
090     QC875.U7
245 00 National Oceanic and Atmospheric Administration, National
Weather Service $h [electronic resource] : $b [website].
246 30 National Weather Service
246 1_ $i Title in HTML header: $a NOAA - National Weather
Service
260     Silver Spring, MD : $b National Oceanic and Atmospheric
Administration, National Weather Service
310     Continuously updated
362 1  Began in 1995.
538     Mode of access: World Wide Web.
500     Title from home page (viewed on Dec. 2, 2002).
520     Presents information on the National Weather Service,
which monitors extreme weather conditions such as
hurricanes, tornadoes, and floods. Includes information on
current weather observations and forecasts, and interactive
map of current watches, warnings, statements, and
advisories, and various other types of weather and climate
information.
610 10 United States. $b National Weather Service.
650 _0 Weather.
650 _0 Meteorological services $z United States.
650 _0 Weather forecasting $z United States.
650 _0 Meteorology $v Observations.
650 _0 Climatology $v Observations.
710 1_ United States. $b National Weather Service.
856 40 $u http://www.nws.noaa.gov/
```

Menomic display of 006 field:

```
006 for Continuing resources:

Freq: k     Regl: r     ISSN:       SrTp: w     Orig: s
Form: s     EntW:       Cont:       GPub: f     Conf: 0     Alph:
S/L: 2
```

Notes on Exercise 2 Record:
- Although the workshop creator thinks that Type "m" is the best choice for this resource, judging it to be an online service with interactive programs at work, not all catalogers may agree. Type "a" would be the other most logical choice.
    - When using Type "m," the 008/fiexed field will be for Computer files/electronic resources. This means that the Continuing resources 006 must be added. But since the fixed coding is already present for Computer files, not additional 006 for Computer files is added.
    - If selecting Type "a," the 008/fixed field will be for continuing resources, and an 006 field for Computer files will be needed, and the "File" element would best be coded "m."
- Title main entry: In contrast to the PCC Web site, in this case the Web site as a whole is not primarily about the corporate body itself, its own internal policies, procedures, etc.; it functions primarily as an online weather service for the general public as well as for this and other agencies. Therefore the corporate body is best given as an added entry rather than as main entry.
- 245 and 500: Full name taken as title from home page title display. Presents "fuller form" than HTML header / title bar form.
- 245: explanatory addition supplied in brackets as other title information because title proper consists solely of a name
- 246: title variant from HTML header / title bar given.
- 310: Known to be updated frequently throughout every day (more frequently than daily).
- 362 1 note uses information from external source, since "any source" is a prescribed source of information for notes, but not for Area 4. This also justifies the use of 1995 in the Date 1 fixed field element.
- 710: added name entry for the corporate body, not selected for main entry.
- 856: notice there are two given in the record; the previous screen shots did not point this out, and it was not a focus of this exercise, but it is worth noting here that there is another address for this site: both URLs take us to the same home page. Also "weather.gov" was given at the top of the home page screen. Some of you may have noticed that and even chosen to transcribe it as a title variant, which is also legitimate.

Exercise 3: "Interim" MARC Coding for Exercise 1 Record

```
Type: a     ELvl: I      Srce: d     Audn:        Ctrl:       Lang: eng
BLvl: m     Form: s      Conf: 0     Biog:        MRec:       Ctry: onc
            Cont:        GPub: s     LitF: 0      Indx: 0
Desc: a     Ills:        Fest: 0     DtSt: m      Dates: 1996,9999

006     m d s
006     suu dss s0   2
007     c $b r $d m $e n
```

Menomic display of 006 fields:

006 for Computer files/Electronic resources:				
Audn: **File: d** GPub: s				

006 for Continuing resources					
Freq: u **Regl: u** ISSN: **SrTp: d** **Orig: s**					
Form: s EntW: Cont: GPub: s Conf: 0 Alph:					
S/L: 2					

Exercise 4 "Interim" MARC Coding for Exercise 2 Record

If Type "m" selected:

```
Type: m     ELvl: I      Srce: d     Audn:        Ctrl:       Lang:
eng
BLvl: m     File: j      GPub: f     MRec:                    Ctry:
  mdu
Desc: a                  DtSt: m     Dates: 1995,9999

006     skr wss f0   2
```

If Type "a" selected:

```
Type: a     ELvl: I      Srce: d     Audn:        Ctrl:       Lang:
  eng
BLvl: m     Form: s      Conf: 0     Biog:        MRec:       Ctry:
  mdu
            Cont:        GPub: f     LitF: 0      Indx: 0
Desc: a     Ills:        Fest: 0     DtSt: m      Dates: 1995,9999

006     m m f
006     skr wss f0   2
```

Menomic display of 006 fields:

006 for Continuing resources					
Freq: k **Regl: r** ISSN: **SrTp: w** **Orig: s**					
Form: s EntW: Cont: GPub: f Conf: 0 Alph:					
S/L: 2					
006 for Computer files/Electronic resources:					
Audn: **File: m** GPub: f					

Exercise 5 (Optional): Loose-leaf

Record if cataloged according to AACR2 2002 Revision, and current OCLC coding practice:

```
Type: a    ELvl: I    Srce: d    GPub: f    Ctrl:      Lang:
BLvl: i    Form:      Conf: 0    Freq: q    MRec:      Ctry:
S/L:  2    Orig:      EntW:      Regl: r    Alph:
Desc: a    SrTp: l    Cont:      DtSt: c    Dates: 2002,9999

245 00  Freedom of information handbook.
260     Washington, D.C. : $b U.S. Dept. of the Interior, Office
  of the Secretary, $c 2002-
300     v. (loose-leaf) : $b ill. ; $c 28 cm.
310     Updated quarterly
```

Notes on Exercise 5 Record:

This exercise is meant to contrast the difference in how you would create a record for this resource before

the new rules and after.   Note the elements in bold and the reasons for their values.

The only thing different if doing this description originally today would be:
- Changing the Bibliographic level to "i" and filling in the 008/fixed field elements for continuing resources
- Omitting the number of volumes in the physical description
- Adding a frequency of updates note

Exercise 6 (Optional): Loose-leaf

Record if cataloged according to AACR2 2002 Revision, and current OCLC coding practice:

```
Type: a    ELvl: I    Srce: d    GPub:      Ctrl:      Lang: eng
BLvl: i    Form:      Conf: 0    Freq: u    MRec:      Ctry: nyu
S/L:  2    Orig:      EntW:      Regl: u    Alph:
Desc: a    SrTp: l    Cont:      DtSt: c    Dates: 1995,9999

245 04 The NAB guide to currently endangered species.
260     New York, N.Y. : $b National Audubon Society      ←[omit date
from 260 $c]
300     v. (loose-leaf) : $b ill. ; $c 22 cm.
```
[310 --- no frequency note]
```
362 1  Began in 1995?                          ←[publication date information; one possible
wording]
500     Description based on: update no. 16, published July, 2002.
```

Notes on Exercise 6 Record:

Note the elements in bold and the reasons for their values.

Especially noteworthy:
- Frequency of updates in unknown; therefore there is no 310 and both Freq and Regl are "u"
- Since not cataloging from first iteration, you give a 'description based on' note and give approximate date information in a 362 1 note and nothing in 260 $c.

Exercise 7 (Optional): Loose-leaf

No Existing Record: In November 2001 you have received the first iteration of a new loose-leaf publication which you will originally catalog. The resource states that it will be updated annually, but it has no date printed anywhere. How do you handle date information in your original record?

Original record:

```
245 00 Directory of digital geospatial metadata clearinghouses.
260    Washington, D.C. : $b Federal Geospatial Data Committee,
$c [2001?]-
310    Updated annually
```
[362 1 – no note given]

Approximate date given in brackets in Area 4, cataloging from first iteration

Important to note:
- You can give an approximate date in area 4 (260 $c) because you are cataloging from **the first iteration** of the resource, but it is in brackets, with a question mark.
- For the same reason, the 362 1 note is not used for publication date information.
- And: no description based on note is needed since you are cataloging from **the first iteration**.
    - Remember that this is a difference between print and electronic integrating resources. For electronic, both chapters 12 and 9 prescribe that you must always give the date viewed for description, even if cataloging form the first iteration; for loose-leafs, however, (like serials) you give a description based on note only if not cataloging from the first iteration.

Session 3 Exercise Answers

Exercise A. Change in title proper

Existing record has:

245 00 EDGAR database of corporate information $h [electronic resource].
500   Title from title screen (viewed Nov. 13, 2000).

Record updated for the title change:

245 00 **EDGAR database** $h [electronic resource].
 	
246 1_ **$i Title on home page: $a Company info on**
          EDGAR
 	
247 10 EDGAR database of corporate information
          $f <Nov. 13, 2000>
 	
500   Title from HTML header (**viewed on May 4, 2001**).
	OR	245 00 **Company info on EDGAR** $h [electronic resource].
		
		246 1_ **$i Title in HTML header: $a EDGAR database**
		
		247 10 EDGAR database of corporate information
		          $f <Nov. 13, 2000>
		
		500 Title from home page (**viewed on May 4, 2001**).

Notes on 3.1:
- **When the title proper has changed, the cataloger may also re-assess the source of title proper.**
- **The two possibilities above reflect the two possible choices, each equally valid.**
- **In this case, whichever title has not been selected as the title proper in 245 should be included in a 246 field for additional identification and access.**
- **In either case, however, the former title proper is what had been selected by the previous cataloger on Nov. 13, 2000 and had appeared in the 245 $a of the existing record.**

Exercise B. Second change in title proper

Existing record has your data from 3.1 above

Record updated for the second title change:

	OR	
245 00 **SEC filings & forms (EDGAR)** $h [electronic resource]. 246 3_ SEC filings and forms 246 3_ Securities and Exchange Commission filings and forms 246 1_ $i Former title on home page: $a **Company info on EDGAR** $f <May 4, 2001> **247 10 EDGAR database of corporate information $f <Nov. 13, 2000>** **247 10 EDGAR database $f <May 4, 2001>** 500 Title from home page (**viewed on Dec. 2, 2002**).	*OR*	245 00 **SEC filings & forms (EDGAR)** $h [electronic resource]. 246 3_ SEC filings and forms 246 3_ Securities and Exchange Commission filings and forms 246 1_ $i Former title in HTML header: $a **EDGAR database** $f <May 4, 2001> **247 10 EDGAR database of corporate information $f <Nov. 13, 2000>** **247 10 Company info on EDGAR $f <May 4, 2001>** 500 Title from home page (**viewed on Dec. 2, 2002**).

Notes 3.2:
- Here again we have two different possibilities depending on what you selected for 3.1 above. Notice the possibility of including the information from the former 246 in a new 246, with the appropriate 246 subfield $i note.
- There are now two 247 fields in the updated record: one for each former title proper.
- The second option shows the alternative forms of 246 and 247 if the existing record were the second of the two possibilities shown on the previous screen.
- This exercise demonstrates not only how to do two updates for title proper for the same Web site, but also the variations that can occur because different catalogers could quite legitimately make different decisions about title proper vs. variant form of title.
- It may also show that there is some artificiality between 246s and 247s for former title for Web sites when there are two or more equally valid possibilities for former and/or current title proper for the site.
- But in the end it doesn't really matter much as long as all the significant variants by which catalog users might search are included in one indexed field or another.

Exercise C. Change in statement of responsibility and main and added entries

Existing record has:

100 1_ Morton, Susan E., $d 1955-
245 10 Publishers of non-fiction articles $h [electronic resource] : $b a database for writers /
　　　$c by Susan E. Morton and Joseph P. Stein.
500 Title from home page (viewed on Jan. 22, 2001).
700 1_ Stein, Joseph P., $d 1953-

Record updated for the changes:

---

100 1_ Stein, Joseph P., $d 1953-

245 10 Publishers of non-fiction articles $h [electronic resource] : $b a database for writers / **$c by Joseph P. Stein and Julia Garcia.**

500　Title from home page (**viewed on Dec. 2, 2002**).

500　Co-authored by Susan E. Morton <Jan. 22, 2001>.

700 1_ Garcia, Julia M., $d 1961-

700 1_ Morton, Susan E., $d 1955-

Notes on 3.3:
- You as the cataloger update the statement of responsibility to reflect the current iteration of the Web site.
- This, in turn, affects your choice of access points. The first named author has changed, therefore your main entry needs to be different.
- You may retain access to the former co-author in a 700 field, but explain ("justify") it by an explanatory note. The wording above is only one of many possible ways to give such a note.

Exercise D. Final iteration of updating loose-leaf

Same record updated and revised according to the AACR2 2002 Revision:

Type: a	ELvl: I	Srce: d	GPub: s	Ctrl:	Lang: eng
BLvl: i	Form:	Conf: 0	Freq: **a**	MRec:	Ctry: miu
S/L: 2	Orig:	EntW:	Regl: **r**	Alph: a	
Desc: a	SrTp: l	Cont: 0	DtSt: **d**	Dates: **1989,2002**	

245 00 Guidelines for typewriting doctoral dissertations.
260   Ann Arbor, MI. : $b University of Michigan Press**, $c 1989–2002.**
300   **2 v.** (loose-leaf) ; $c **28 cm.**
310   Updated annually, $b **1997-2002**
321   Updated semiannually, $b 1989-1996

The changes for 3.5:
- The record is "closed off"
- Ending dates of publication are entered in 260 $c (because you have the final iteration) and 008 Dates fields.
- Type of Date/Publication status code is change from "c" to "d"
- The number of volumes is entered in 300 $a
- The dimensions are changed to reflect the latest iteration.
- The range of dates applying to the last frequency of updates may be added.

Session 5 Case Studies – Answers

Topic #1: Choice of Type of Record ("Type" and OCLC format/workform) and Type of Computer
File ("File") codes.

Resource 1A.
- Type: e – Cartographic material
- File: c – Representational

Resource 1B.
- Type: k – Two-dimensional non-projectable graphic (i.e., digital image data)
- File: c - Representational

Resource 1C.
- Type: j – Musical sound recording
- File: h - Sound

Resource 1D.
- Type: a – Language material or m – Computer file/Electronic resource
- File: m – Combination ; OR j – Online service

Resource 1E.
- Type: m – Computer file/Electronic resource
- File: m – Combination

Resource 1F.
- Type: a – Language material
- File: d – Document (OR: Type z – Other)

Resource 1G.
- Type: m – Computer file/Electronic resource
- File: b – Computer program

Topic #2: Selecting chief source of information and transcribing title and statement of responsibility.

Resource 2A.
• Options include:
   o 245 00 Clásica.com $h [electronic resource].
   o 245 00 Clásica.com $h [electronic resource] : $b your online guide to classical music performance & recordings.
   o 245 00 Clásica $h [electronic resource].
   o 245 00 Clásica $h [electronic resource] : $b your online guide to classical music.
• Suggested best choice:
   o 245 00 Clásica.com $h [electronic resource] : $b your online guide to classical music performance & recordings.
   o 246 1_ $i Title from HTML header: $a Clásica : $b your online guide to classical music
   o Title from home page. [or other wording]

Resource 2B.
• Options for title proper include:
   o The INS online
   o Immigration and Naturalization Service
   o USINS Internet home page

• Suggested best choice: either "The INS online" or "USINS Internet home page" as title proper, with the other given in a 246, and a 246 for "Immigration and Naturalization Service", which could also be transcribed as a statement of responsibility if taken as part of the formal title display on the home page and recorded like this:
   o 245 04 The INS online $h [electronic resource] / $c Immigration and Naturalization Service.
   o 246 3_ Immigration and Naturalization Service online

Resource 2C.
• Options for title include:
   o Welcome to the UN : it's your world
   o UN : it's your world
   o United Nations : it's your world
   o Welcome to the United Nations
   o United Nations
   o United Nations home page

• Suggested best choice:
   o 245 00 United Nations home page $h [electronic resource]
   o 246 30 United Nations

- o 246 1_ $i Title in HTML header of home page: $a Welcome to the UN : $b it's your world
- o 246 3_ Welcome to the United Nations
- o 246 3_ UN

Resource 2D.
- Suggested best choice:
  - o 245 00 How to plan an ALCTS program $h [electronic resource] / $c Association for Library Collections & Technical Services.

Resource 2E.
• Possibilities include:
    o 245 10 ASA membership directory $h [electronic resource].
    o 245 10 ASA membership directory $h [electronic resource] / $c American
    Statistical Association
• Suggested best choice:
    o 245 10 ASA membership directory $h [electronic resource] / $c American
    Statistical
    Association.
    o 246 3_ American Statistical Association membership directory

---

Topic #3: Ascertaining and recording publisher, place, and dates of publication.

Resource 3A.
• Possibilities include:
    o **260 [Peabody, MA] : $b CAST, $c [1996]-** ←   suggested best choice
    o 260 [Peabody, MA] : $b CAST
    o 362 1 Began in 1996
    o 260 [Peabody, MA] : $b CAST
    o 362 1 Began in 1996?

Resource 3B.
• Possibilities include:
    o 260 [S.l.] : $b Python
    o 260 [S.l.] : $b Python.org
    o 260 [S.l. : $b s.n.] ←   possible best choice
    o **260 [Netherlands] : $b Hosted by XS4ALL** ←   possible best choice
    o 362 1 Began sometime after early 1990s and before 2003. ←   or some such
    note

Topic #4: Creating and updating records for changing content.

Resource 4A.
• Suggested possibilities:
    o 245 00 MapQuest $h [electronic resource].
    o 245 30 MapQuest.com
    o 500 Title from home page (viewed Dec. 10, 2002).
    o 547 Subtitles on various iterations varies.
    o 520 [include key words and phrases included in some former subtitles, such as
    driving

directions, maps, traffic reports, etc.]
  o 6XX [also include some of those terms in subject headings]

Resource 4B.
• Suggested answers: keep all descriptive elements, including 520 summary note and all name
and subject headings, general so as to encompass the scope of this Web site that covers the
former occupant of the White House, the current presidency, etc., rather than any specific one.
Avoid formal 505 contents note.

Appendix C LCRI 1.0

Includes revisions from Nov. 2003 and Aug. 2006, Source Catalogers Desktop, viewed Aug. 2007.

What Is Being Cataloged?

This section represents LC/PCC practice.

Before creating a bibliographic record, determine what is being cataloged.

Answer these two questions:

1) What aspect of the bibliographic resource will the bibliographic record represent?

   a) A resource may not be part of a larger resource and so the bibliographic record can represent only that resource.

   b) A resource may be part of a larger resource (one part of a multipart item, one analytic of a monographic series, one of several separate resources on a Web site, etc.). The bibliographic record could represent the "smaller" or the "larger" resource.

   c) A resource may not be part of a larger resource but local cataloging policies may specify creating a bibliographic record for a made-up larger resource of materials that are not published, distributed, or produced together[2].

2) What is the type of issuance of that aspect?

   a) See both the definitions from AACR2 appendix D and the diagram in "Type of Issuance" below.

   b) If the situation is still not clear, then consider the guidelines given in two other sections of this LCRI: "Monograph vs. Serial" and "Situations Requiring Further Consideration."

   c) See the section "Edition or Copy of Monograph" for guidelines about creating separate records for monographs.

It may be appropriate, after one or more bibliographic records have been cataloged, to change the cataloging decision (e.g., recatalog a monograph as a serial). See the section "Change in Cataloging Decision" for guidelines.

---

[2] These guidelines do not address the cataloging of such a made-up larger resource. LC *catalogers*: See DCM C14 for collection-level cataloging guidelines; see DCM C12.7 for guidelines for 2A cataloging (creation of a collected set record for an unnumbered multipart item)

Also, a publisher may change the type of issuance of a bibliographic resource. See the last section, "Change in Type of Issuance," for guidelines.

Type of Issuance

This section represents LC/PCC practice.

"Type of issuance" refers to how the bibliographic resource is published, distributed, or produced and, if it is updated, how it is updated. There are three types of issuance: monograph, serial, and integrating resource. (See the definitions from AACR2 appendix D and diagram below.)

Monograph: A bibliographic resource that is complete in one part or intended to be completed in a finite number of parts. The separate parts may or may not be numbered.

   Use rules in chapter 1 and the chapter(s) representing the carrier.

Serial: A continuing resource issued in a succession of discrete parts, usually bearing numbering, that has no predetermined conclusion.

   Use rules in chapter 1, chapter 12, and the chapter(s) representing the carrier.

Integrating resource: A bibliographic resource that is added to or changed by means of updates that do not remain discrete and are integrated into the whole. Integrating resources can be finite or continuing.

Type of Issuance

Finite resources   Continuing resources

Monographs   Serials   Integrating resources*

Updates remain discrete   Updates do not remain discrete

*Some integrating resources are finite; use chapter 12 rules for them, too.
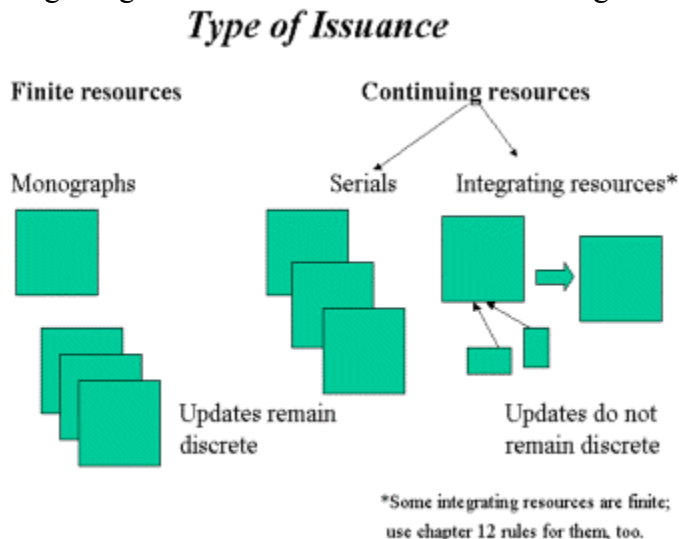
Use rules in chapter 1, chapter 12, and the chapter(s) representing the carrier.

In case of doubt about type of issuance, apply the following guidelines:

If the decision has been narrowed down to "serial vs. integrating resource" and there is no information about the type of issuance but the resource has wording that refers to "edition," determine if that wording represents a numeric designation or an edition statement. If it is a numeric designation, catalog the resource as a serial; if it is an edition statement, catalog it as an integrating resource.

If the decision has been narrowed down to "monograph vs. integrating resource" and there is no information about the type of issuance, catalog the resource as an integrating resource if there is a likelihood the resource will be updated (i.e., assume the updates will not be discrete); catalog as a monograph if there is no indication that the resource will ever be updated.

Monograph vs. Serial

This section represents LC/PCC practice.

If the bibliographic resource to be cataloged and/or other bibliographic records in the database indicate that the resource has been or will be published in more than one part that will remain discrete or be published more than once, consider the combination of characteristics below in deciding whether to catalog the resource as a single-part/multipart monograph or as a serial. Note the exception for publications of limited-duration activities at the end of this section.

1) Frequency of publication

   a) If the resource has a stated frequency of publication (in the title proper, in the preface, etc.), catalog as a serial.

   b) If the resource is published in new editions, catalog as a serial if the frequency of the editions is one to two years; give greater consideration to continuing to catalog as monographs if the editions are published three or more years apart.

2) Presence and type of numbering. Although the presence of numbering is no longer part of the definition of a serial, most serials except for unnumbered monographic series will have numeric, alphabetic, and/or chronological designations.

   a) If the resource has a numeric/alphabetic (e.g., volume 1; tome 3; Heft A) or chronological designation (e.g., 2001; June 2002; 2002-1) in the title proper or elsewhere in the resource and it is likely that the resource doesn't have a predetermined conclusion, catalog as a serial.

   b) If the resource has acquired a numeric, alphabetic, or chronological designation after the first issue, recatalog as a serial.

c) If the resource is published in frequent editions (see 1)b) above), it must have a designation (e.g., date, numeric edition statement) that could be used as numbering in order to be cataloged as a serial.

3) Likelihood of no predetermined conclusion. If the resource indicates that there is no predetermined conclusion, catalog as a serial. If the resource doesn't have such information, assume that a resource that has either of the following characteristics is a serial if it also meets the criteria given above for frequency and numbering.

   a) Title proper implies continuing publication. If the title proper includes words that imply continuing publication (e.g., "Advances in ...;" "Developments in ...;" "Progress in ..."), catalog as a serial. If the issues also have analyzable titles, analyze the issues.

   b) A subscription can be placed for the resource.
Publications of limited-duration activities: Also use the serial rules in chapter 12 for the cataloging of certain resources related to limited-duration activities provided that these resources have some characteristics of serials: successive issues, numbering, and perhaps frequency. Examples include a daily bulletin issued during a non-recurring meeting, a quarterly activities report of a project, and an annual report of an expedition. Do not recatalog records for such resources created before Dec. 1, 2002.

Situations Requiring Further Consideration

This section represents LC/PCC practice.

1) Electronic resources. If the resource was/is published in print, make the decision to catalog the electronic resource as a serial, integrating resource, or monograph based on the electronic resource itself, not on how it was issued in print. Information about the planned type of issuance may be given in the resource's "read me" files, etc.

   a) Catalog as serial:
     i) Remote access resource: a resource having material added as discrete, usually numbered issues (an "issue" can consist of a single article). The resource might contain a listing of back volumes, back issues, images of journal covers for sequential issues; only current issue may be available as a separate issue
     ii) Direct access resource: a resource whose carrier is issued successively (this situation is analogous to a print serial whose latest volume supersedes any earlier volumes).

        Note that such resources can be mounted on networks such that the successive issuance of the carrier is not observable to the cataloger or end user;

when contributing cataloging in a shared environment (e.g., bibliographic utility), the record should reflect the carrier and type of issuance as published.

b) Catalog as an integrating resource:
i) Remote access resource: a resource having material added, changed, or deleted via updates that do not remain discrete (e.g., might contain articles from more than one journal).
ii) Direct access resource: no direct access resource can be issued as an integrating resource (assumption that would be changed if proven incorrect).

c) Catalog as a monograph: Remote or direct access resource: a resource complete in one part or intended to be complete in a finite number of parts, including those resources that are corrected via "errata" information.

2) Resources issued in loose-leaf format. When deciding to catalog a bibliographic resource issued in loose-leaf format as a serial, an integrating resource, or a monograph, make the decision based on the type of issuance of the primary component. If there is a stated frequency, determine if the frequency applies to the primary component or to any updates.

Note that a bibliographic resource issued in loose-leaf format is not automatically to be cataloged as an updating loose-leaf.

a) Catalog as a serial:
i) Resource otherwise meeting definition of serial whose issues remain discrete even though they are to be stored in a binder (as successive sections in the binder or subdivided/filed into separate sections in the binder)
ii) Resource whose binders are issued successively even though the contents filed into each binder may be updated in integrating fashion until the next binder is issued

b) Catalog as an integrating resource: Resource consisting of a binder or binders in which pages are added, removed, or replaced until the next edition of the resource is published or until complete

c) Catalog as a monograph: Resource complete as issued or intended to be complete in a finite number of parts

3) Conference publications. Conference publications typically consist of the minutes, proceedings, etc., of a regularly-held meeting of one or more corporate bodies or are publications that contain the proceedings, etc., of ongoing topical conferences, symposia, or colloquia.

a) Catalog as serials ongoing conference publications that are being cataloged for the first time, unless they are covered by the exclusions in paragraph b) below. Consider a conference publication to be "ongoing" if words such as "first" or

"annual" appear in conjunction with the name of the conference or the title of the publication or if multiple successive issues show that the publication is continuing in nature.

   b) Catalog as monographs those conference publications that are not ongoing or that:
    i) have a
title unique to each issue appearing on the chief source, and/or
    ii) are issued as part of a numbered monographic series.
Once the decision to catalog as a monograph or as a serial is determined based on the first—or earliest held—issue of a conference publication, prefer to retain that decision. When there is a change in the main entry for a conference publication cataloged as a serial, consider the publication to be "new" and decide whether to catalog it as a monograph or as a serial according to the above criteria.

When CONSER serial records exist for conferences represented by LC monograph records, LC serial catalogers will use "xlc" in the 042 field but will not de-authenticate the records.

4) Supplements. If the supplement can be used independently from the main resource, create a separate bibliographic record for it based on its type of issuance. For other situations, give a note about the material on the record for the main resource.

525 ## $a Kept up-to-date by supplements.

Do not catalog a dependent supplement as a serial just because it has a stated frequency (e.g., an annual supplement to a monograph).

5) Republications

   a) Republication of a serial: Generally, catalog a republication of a serial as a serial. However, catalog the following as a monograph:

A republication of a single issue or a limited number of issues
A collection of bibliographically unrelated serials or articles.

   b) Republication of a monograph: Catalog as a monograph.

   c) Republication of an integrating resource: Catalog as a monograph or as an integrating resource based on the type of issuance of the republication.

6) Printed travel guides. LC practice as of 2001: When deciding whether to catalog a printed travel guide as a serial or as a monograph and there is no information about the likelihood that it will be continued indefinitely, apply the following guidelines:

a) Generally, catalog a travel guide as a serial if it is general in scope because such guides usually are continued indefinitely. "General in scope" means the guide contains a variety of current information, e.g., about where to go, where to stay, and what to do. Apply this policy to state, region, or country guides for the United States, to region or country guides for other countries, and to guides for major cities. If a numeric or chronological designation is not available, supply a chronological designation based on the publishing or copyright date (cf. LCRI 12.3C1).

b) In case of doubt, catalog as a monograph.

7) LC practice: Certain other printed resources
  After determining that the printed bibliographic resource
  — is published in successive parts, and
  — there is no information that the resource will be complete in a finite number of parts, and
  — it isn't one of the resources noted in 1)-6) above, generally follow the decision to catalog as a monograph or as a serial for the specific categories in the two lists below. If the printed resource isn't represented by one of the categories below, catalog as a serial.

  a) Catalog as monographs:
          books "issued in parts" (fascicles)
          cartographic materials
          censuses
          encyclopedias
          hearings
          publications of five-year plans
  b) Catalog as serials:
          alumni directories
          college catalogs
          court reports
          sales/auction catalogs
          session laws

Edition or Copy of Monograph

This section represents LC/PCC practice.

When a new manifestation of an item reaches the cataloger, the question arises as to whether this is a copy of an earlier manifestation or an edition separate from the earlier manifestation needing its own bibliographic record. Consult the definition of "Edition" in Appendix D. If, according to this definition, two items are known to be two different editions, create separate records for each.

Also, consider that a new edition is involved whenever

1) there is an explicit indication of changes (including corrections) of content; or,

2) anything in the following areas or elements of areas differs from one bibliographic record to another: title and statement of responsibility area, edition area, the extent statement of the physical description area, and series area. (Note:

For printed music and sound recordings, consider that different editions exist whenever two items have different publisher's numbers or plate numbers). (For an exception relating to CIP items, see below.)
Whenever the question relates to the publication, distribution, etc., area or to ISBNs, consider that the item is a copy if the only variation is one or more of the following:

1) a difference in the printing or copyright date when there is also a publication date;

2) a minor variation in an entity's name. There are relatively few examples of this phenomenon, which arises when a publisher uses multiple forms concurrently. For example, "Duckworth" and "G. Duckworth" and "St. Martin's" and "St. Martin's Press" have been used at the same time by these publishers. A genuine name change, even if minor, should not be considered as a variation;

3) the addition, deletion, or change of an ISBN;

4) a difference in binding; or,

5) a difference in the edition statement or the series whenever the item is a CIP book issued by the publisher in both a hardbound and a softbound version.

For variations in the publication, distribution, etc., area not covered by the preceding statements, consider that the item is a new edition. Noteworthy examples for the publication, distribution, etc., area are variations involving different places or entities transcribed or any difference in an entity's name that is suggestive of either a name change or a different entity. Examples of the latter case are the many instances of a sequence of names used, with one used for some time and another at some point replacing the first. For example, "Harper & Brothers" becomes "Harper & Row"; "Doubleday, Doran" becomes "Doubleday."

N.B. Rare books in general follow the same policy, with exceptions as necessary.

Change in Cataloging Decision: Monograph/Serial

This section represents LC/PCC practice.

At some point after one or more monograph bibliographic records has/have been created and another resource with the same choice of main entry and form of title proper is received for cataloging, determine if the resource should be cataloged as a serial to save the time of continuing to prepare separate monograph records. If the resource is a conference publication, see paragraph 3) in the section "Situations Requiring Further Consideration" above. Otherwise, consider the following aspects when making the decision to recatalog as a serial:

1) the resource should have a designation (e.g., date, numeric edition statement) that could be used as numbering;

2) the frequency of the editions is one to two years (give greater consideration to continuing to catalog as monographs if the editions are published three or more years apart).

LC practice: LC no longer routinely cancels fully cataloged monograph records. Notes are added to the serial and monograph records to assist users and staff to locate all holdings for the title in the library. The serial bibliographic record continues to describe the entire serial.

Note added to monograph record:
500 ## $a Issues for 1996- cataloged as a serial in LC. $5 DLC

Note added to serial record:
500 ## $a Earlier issues, 1993-1995, cataloged as monographs in LC. $5 DLC

Note added to monograph record:
500 ## $a Editions for 1-2, 4, 6, 8- cataloged as a serial in LC. $5 DLC

Note added to serial record:
500 ## $a Editions for 3, 5, 7 cataloged as monographs in LC. $5 DLC

Change in Type of Issuance

This section represents LC/PCC practice.

The publisher of a bibliographic resource may decide to change the type of issuance: monograph to integrating resource (e.g., issuing replacement pages to what had been a single-part monograph stored in a binder), monograph to serial (e.g., expanding the plan for the content of a multipart item so it no longer has a predetermined conclusion), serial to integrating resource (e.g., changing from publishing as successive issues to publishing as an updating Web site), etc. Sometimes the cataloger will not have enough information at the time of creating the bibliographic record to determine the correct form of issuance. Information available later will indicate that the type of issuance represented by the bibliographic record isn't correct.

In order to accommodate the requirements for the distribution of MARC records by the Library's Cataloging Distribution Service and the Library's ILS restrictions on deletion of records in the database, follow the appropriate instruction given in the table below when the type of issuance of a resource has changed or more information shows that the original decision on type of issuance wasn't correct. [Note: Final decisions have not yet been made for all of the categories. When the information is available, this section of the LCRI will be posted on the CPSO public Web site (http://www.loc.gov/catdir/cpso/) until the LCRI is reissued.] Initial Articles

This section represents LC/PCC practice.

Transcribe initial articles as found: in the title and statement of responsibility area (see LCRI 21.30J for the guidelines on setting the non-filing indicator in relation to the title proper on MARC records), edition area, series area, and note area. For the publication, distribution, etc., area, generally do not transcribe articles preceding the name of the publisher, distributor, etc.

Appendix D Glossary

Definitions are taken from
- Anglo-American Cataloging Rules (AACR)
- CONSER Cataloging Manual (CCM)
- CONSER Editing Guide (CEG)
- Krol, Ed. Adapted by Bruce Klopfenstein. The Whole Internet User's Guide & Catalog. Academic ed. Belmont, Calif. : Integra Media Group, c1996. (Cited in Definitions as Krol)
- Guidelines for the Use of Field 856. Prepared by the Network Development and MARC Standards Office, Library of Congress. Rev. March 2003. URL: http://lcweb.loc.gov/marc/856guide.html
- Library of Congress Rule Interpretations (LCRI)
- MARC 21 Format for Bibliographic Data (MARC 21)
- NetLingo Dictionary of Internet Words: A Glossary of Online Jargon with Definitions of Terminology & Acronyms. NetLingo, Inc., c1994-2007. URL: http://www.netlingo.com (NetLingo)
- Online Audiovisual Catalogers Cataloging Policy Committee. Source of Title Note for Internet Resources, Third revision, 2005. URL: http://ublib.buffalo.edu/libraries/units/cts/olac/capc/stnir.html (OLAC)

Definitions of terms relevant to this workshop

Anonymous FTP (File Transfer Protocol): allows retrieval of electronic resources from a remote site without requiring a user ID or password. (CCM)

ASCII: American Standard Code for Information Interchange. A standard character-to-number encoding scheme used widely in the computing industry. The term "ASCII" is also used to refer to electronic files that consist only of plain text. (CCM)

Banner: A band of text or text and graphics, usually situated at the top of the a web page, that contains title and/or author credits and tells the user what the content of the page is about. (OLAC)

Bibliographic resource: An expression or manifestation of a work or an item that forms the basis for bibliographic description. A bibliographic resource may be tangible or intangible. (AACR)

Browsers: Software programs for reading hypertext documents. Browsers are mounted locally either on site for terminal mode or on the user's PC. Netscape, Internet Explorer, and Lynx are examples of hypertext browsers used to view World Wide Web documents. Netscape and Internet Explorer are graphical browsers, Windows- or Mac-based; Lynx is a text-only terminal mode browser. They all allow a user to read and follow hypertext

links specified in a document. They vary in their ability to handle graphic or sound files. (CCM)

Client: A software application that works on your behalf to extract a service from a server somewhere on the network. (Krol)

Computer file. See Electronic resource.

Continuing resource: A bibliographic resource that is issued over time with no predetermined conclusion. Continuing resources include serials and ongoing integrating resources. (AACR)

Database: A collection of logically interrelated data stored together in one or more computerized files, usually created and managed by a database management system. (MARC 21)

Dial-up: A computer-to-computer connection made by using a terminal emulator, a modem and connecting via a telephone line; or a computer port that accepts dial-up connections. Computer bulletin boards are usually accessed through dial-up connections. (CCM)

Direct access (Electronic resources): The use of electronic resources via carriers (e.g., discs/disks, cassettes, cartridges) designed to be inserted into a computerized device or its auxiliary equipment. (AACR)

Domain name: The address or URL of a particular Web site, it is the text name corresponding to the numeric IP address of a computer on the Internet. For example: www.netlingo.com is the domain name for the numeric IP address "66.201.69.207." [Top-level domains include: .net, .org, .gov, .edu, .com, etc.] (NetLingo)

Edition (Electronic resources): All copies embodying essentially the same content and issued by the same entity. (AACR)

E-journal (electronic journal): An electronic publication, similar to an e-zine or zine. An e-journal, however, is typically found in academic circles and is a regularly published journal either published solely in electronic form or made available in electronic form. (NetLingo)

Electronic mailing list: Internet software that automatically processes commands in an email forum environment. It provides for automatic mailing of electronic serial issues to subscribers and handles messages sent to and from discussion lists. (CCM)

Electronic resource: Material (data and/or program(s)) encoded for manipulation by a computerized device. This material may require the use of a peripheral directly connected to a computerized device (e.g., CD-ROM drive) or a connection to a computer network (e.g., the Internet).   (AACR)

Email (electronic mail): A system whereby a computer user can exchange messages with other computer users (or groups of users) via a communications network utilizing a standardized protocol. Many electronic journals are available via electronic mail subscriptions, either through an electronic mailing list or by direct email from the distributor of the serial. (CCM)

File (electronic resources): A basic unit in which electronic resources are organized and stored. Electronic resources can contain one or more files. See also Electronic resource. (AACR)

FTP (File Transfer Protocol): A protocol that defines how to transfer files from one computer to another; also the access method used to move files from a remote location to a local site for use. To retrieve issues, the user initiates an FTP session by logging into a remote host computer, changing to the desired directory, and retrieving the files. (CCM)
Gateway: A computer system that transfers data between normally incompatible applications or networks. It reformats the data so that it is acceptable for the new network (or application) before passing it on. (CCM)

Gopher: A menu-driven, subject-based system for exploring Internet resources. Gophers provide links to remote locations where electronic resources or services are available without the user having to know the exact Internet address of these locations. (CCM)

Granularity: The level of detail at which an information object or resource is viewed or described.

Home page: The first page or front page of a Web site. It serves as the starting point for navigation (not be confused with a buffer page, doorway page, or splash page) . (NetLingo)
The hypertext document that serves as the "preface" for a service or publication mounted on the World Wide Web. It is normally an introductory screen that provides general information about the institution maintaining the site, or a publication or group of publications available. Hypertext links are included to access specific documents or files archived at the site. (CCM)

Host computer: A computer, also called a node, that directly provides service to a user. (CCM)

Host name: The address of the host computer on which a remote-access electronic resource resides. (CCM)

HTML (Hypertext Markup Language): A subset of Standard Generalized Markup Language (SGML). The language in which World Wide Web documents are written. (CCM)

HTML header: Refers to the HEAD element of HTML source code specifications. The HEAD element contains information about the current document, such as the TITLE element and keywords that may be useful to search engines, and other data that is not considered document content. The TITLE element can be displayed separately from the document in the browser title bar. (CCM)

HTML source: The underlying source code for an HTML document. It includes HTML elements such as the HEAD, BODY, and other coding which gives information about the document and/or determines how a document is displayed in a browser. (CCM)

Hypertext Transfer Protocol (http): Method of presenting information in which selected words or other document elements, when chosen, execute automatic links to related documents or files. The linked documents on the World Wide Web may contain graphics, sound, or even moving images. (CCM)

Integrating resource: A bibliographic resource that is added to or changed by means of updates that do not remain discrete and are integrated into the whole. Integrating resources can be finite or continuing. Examples of integrating resources include updating loose-leafs and updating Web sites. (AACR)

Internet: The world-wide "network of networks" that are connected to each other, using the IP protocol and other similar protocols. The Internet provides file transfer, remote login, electronic mail, news, and other services. (Krol)

IP (Internet Protocol): The most important of the protocols on which the Internet is based. It allows a packet to traverse multiple networks on the way to its final destination. Often, this is used in conjunction with TCP (Transmission Control Protocol), as in TCP/IP. (Krol)

IP address: The Internet Protocol or numeric address of a computer connected to the Internet. It consists of four numbers separated by periods. (CCM)

Iteration: An instance of an integrating resource, either as first published or after it has been updated. (AACR)

Key-title: The unique name assigned to a bibliographic resource by centres of the ISSN Network. (AACR)

Loose-leaf. See Updating loose-leaf.

Loose-leaf service: A publication issued in several component parts, often in a combination of updating loose-leaf and bound volumes containing both primary and secondary source material. Sometimes a loose-leaf service is called a reporter. (LCRI 12.0)

Modem: A piece of equipment that connects a computer to a data transmission line (typically a telephone line of some sort). (Krol)

Monograph: A bibliographic resource that is complete in one part or intended to be completed within a finite number of parts. (AACR)

Navigational tools: These include various tools such as gopher, WAIS, WWW, Archie, Veronica and Jughead, which make information on the Internet easier to locate and use. (CCM)

PDF: Portable Document Format. The file format of documents viewed and created by the Adobe Acrobat Reader, Acrobat Capture, Adobe Distiller, Adobe Exchange, and the Adobe Acrobat Amber Plug-in for Netscape Navigator. This file format was developed in hopes to standardize formatting of documents that are used on the Internet. (NetLingo)

Port: 1. A number that identifies a particular Internet application. When your computer sends a packet to another computer, the packet includes information about the protocol it is using and the application it is trying to communicate with. The port number identifies the application. 2. A physical input/output channel, as in a PC's "serial port." (CCM)

Protocol: A mutually-determined set of formats and procedures governing the exchange of information between different kinds of computers. (CCM)

Remote access (electronic resources): The use of electronic resources via computer networks. (AACR)

SGML (Standard Generalized Markup Language): A standard that provides a uniform way of formatting textual documents so that they can be read by different document processing tools. (CCM)

Serial: A continuing resource issued in a succession of discrete parts, usually bearing numbering, that has no predetermined conclusion. Examples of serials include journals, magazines, electronic journals, continuing directories, annual reports, newspapers, and monographic series. (AACR)

Server: Software that allows a computer to offer a service to another computer. Other computers contact the server program by means of matching client software. Also, the computer on which the server software runs is often called the "server." (CCM)

Source code: Formal computer program instructions in their original form. Source code is the only human readable version of a computer program. Examples - html, sgml, etc. The source code header is displayed in the title bar of many web browsers. (OLAC)

Splash page: A "first" or "front" page that you often see on some Web sites, usually containing a "click-through" logo or message, or a fancy Flash presentation, announcing that you have arrived. The main content and navigation on the site lie "behind" this page. (NetLingo)

TCP (Transmission Control Protocol): One of the protocols on which the Internet is based (a connection-oriented reliable protocol). Often used in combination with IP (Internet Protocol) as in TCP/IP. (Krol)

Telnet: The Internet protocol for remote terminal connection service. Telnet allows a user at one site to log in and interact with a system at another site just as if the user's terminal were connected directly to the remote computer. (CCM)

Title bar: The colored bar at the top of each window that displays the program and file names. (NetLingo)

Title screen (Electronic resources): In the case of an electronic resource, a display of data that includes the title proper and usually, though not necessarily, the statement of responsibility and the data relating to publication. (AACR)

Top-level domain (a.k.a. TLD): In the Domain Name System (DNS) hierarchy, it is the highest level under the root. In a domain name, it is that portion that appears furthest to the right; for example, the "com" in www.netlingo.com. Two letter domains, such as .uk, .de and .jp (for example), are called "country code top-level domains" (ccTLDs) and correspond to a country, territory, or other geographic location. [Other top-level domains include: .com, .edu, .gov, .net, .org, country codes.] (NetLingo)

Transfer volume: A bibliographic unit containing material of a permanent nature originally issued as a section or binder of a loose-leaf service. The material is transferred from the loose-leaf mode by one of the following methods: the material is reissued by the publisher in bound form and sent to the subscriber as part of a subscription or made available for separate purchase; the material is transferred from the original loose-leaf mode to permanent binders (sometimes supplied by the publisher) or bound separately by the subscriber. (LCRI 12.0)

Updating loose-leaf: An integrating resource that consists of one or more base volumes updated by separate pages that are inserted, removed, and/or substituted. (AACR)

URI: Uniform Resource Identifier. Provides a standard syntax for locating files using existing Internet protocols as in a Uniform Resource Locator (URL) or by resolution of a Uniform Resource Name (URN) (CCM)

URL: Uniform Resource Locator. Location information of an electronic resource expressed in a standardized format, which allows for electronic resources to be sent and received automatically. The World Wide Web uses the URL as the basis of linking to other files and documents around the Internet. A URL can be identified by a protocol such as "http." (CCM)

URN: Uniform Resource Name. A URI that has an institutional commitment to persistence, availability, etc. A particular scheme, identified by the initial string "urn:", that is intended to serve as a persistent, location-independent, resource identifier. (CCM)

Usenet News: Separate from the Internet but available with many Internet accounts, it's a worldwide set of over 12,000 bulletin boards, called "newsgroups." Software called a "newsreader" is used to read and post. (CCM)

Userid: Sometimes called "user name," userid is short for "user identification." This precedes the @ sign in an email address. (CCM)

WAIS (Wide Area Information Servers): A very powerful means of providing indexing of databases or selected collections of full-text documents across the Internet in addition to its search capabilities. WAIS databases include documents, images, sounds, and other types of data. (CCM)

World Wide Web (WWW): A hypertext-based system for locating and accessing Internet resources which presents materials to the user in the form of interlinked documents (which can include text, images, and digitized sound). (CCM)

Web page: There are many uses for this term, with subtle differences in meaning. The most technically correct usage is for a single HTML file that contains text and images, is part of a Web site, and has an individual file name assigned to it. When viewed by a Web browser, this file could actually be several screen dimensions long (appearing as more than "a page"). … Large Web sites are said to have hundreds of pages of information. In this usage, "page" refers to the actual hundreds of separate documents varying in length, each with a different topic or subject. … (NetLingo)

Web site: A place on the World Wide Web that's comprised of files organized into a hierarchy. Each file or document contains text or graphics that appear as digital information on a computer screen. A site can contain a combination of graphics, text, audio, video, and other dynamic or static materials. … As is the case with many Net terms, "Web site" is often used interchangeably with other words, such as homepage and Web page. For example, you may hear someone refer to their "homepage" when in fact they are talking about an entire Web site. (NetLingo)

Appendix E: Selected Bibliography

A.   Cataloging Tools and Resources:

1.   **Anglo-American Cataloguing Rules, Second Edition, 2002 Revision** (AACR2). Ottawa: Canadian Library Association; Chicago: American Library Association.

2.   **BIBCO Web site:** http://www.loc.gov/catdir/pcc/bibco.html

3.   **Bibliographic Formats and Standards.** Dublin, Ohio: OCLC. Freely available at: http://www.oclc.org/oclc/bib/about.htm

4.   **Cataloger's Desktop.** Washington, D.C.: Library of Congress, Cataloging Distribution Service. This CD-ROM product contains most of the LC documentation for cataloging.

5.   **Cataloging Electronic Resources: OCLC-MARC Coding Guidelines** by Jay Weitz: http://www.oclc.org/connexion/documentation/type.htm

6.   **Cataloger's Reference Shelf:** http://www.tlcdelivers.com/tlc/crs/CRS0000.htm

7.   **CONSER Cataloging Manual: Module 31: Remote Access Electronic Serials (Online Serials):** http://www.loc.gov/acq/conser/Module31.pdf

8.   **CONSER Web Site:** http://www.loc.gov/acq/conser/. Includes current information about CONSER activities in the area of electronic serials cataloging.

9.   **Government Printing Office Cataloging Guidelines.** Washington, D.C.: Cataloging Branch, Library Programs Service, US GPO. 4th ed. (2001) available at: http://www.access.gpo.gov/su_docs/fdlp/cip/gpocatgu.pdf

10.   **Integrating Resources:** A Cataloging Manual prepared by Diane L. Boehr and Alice E. Jacobs with assistance of Regina T. Wallen and Kathleen M. Winzer. (Appendix A to BIBCO Participants' Manual): http://www.loc.gov/catdir/pcc/bibco/irman.pdf

11.   **Internet Library for Librarians.** Available from InfoWorks Technology Company. http://www.itcompany.com/inforetriever/. Includes sections on organizing web resources.

12.   **ISBD(ER): International Standard Bibliographic Description for Electronic Resources:** http://www.ifla.org/VII/s13/pubs/isbd.htm

13.   **Journal of Internet Cataloging**. Binghamton, NY: Haworth Press.

14.   **Library of Congress: Guidelines for Coding Electronic Resources in Leader/06:** http://lcweb.loc.gov/marc/ldr06guide.html

15.   **Library of Congress: Guidelines for the Use of Field 856:** http://www.loc.gov/marc/856guide.html

16.   **Library of Congress Implementation of the 2002 Edition of AACR2 - Training Materials.** http://lcweb.loc.gov/catdir/cpso/train.html

17.   **Library of Congress Rule Interpretations** (LCRIs). Washington, D.C.: Cataloging Distribution Service, Library of Congress.

18.   **Library of Congress, Cataloging Policy And Support Office: Library of Congress Implementation of the 2002 Edition of AACR2 - Significant Changes**: http://lcweb.loc.gov/catdir/cpso/aacr2002.html

19.   **MARC 21 Format for Bibliographic Data.** Washington, D.C.: Cataloging Distribution Service, Library of Congress. **Concise Format** available online at: http://lcweb.loc.gov/marc/bibliographic/ecbdhome.html

20.   **OCLC Technical Bulletin 247: [Section] 1. Coding Practice for Integrating Resources:** http://www.oclc.org/technicalbulletins/247/#1

21.   **PURL home page:** http://purl.oclc.org/

B.   Additional Cataloging Learning Resources and Readings:

1.   Library of Congress Cataloging Directorate. *Bicentennial Conference on Bibliographic Control for the New Millennium.*
       http://lcweb.loc.gov/catdir/bibcontrol/

2.   OCLC Institute. *Cataloging Internet Resources Using AACR2 and MARC 21* (fee-based online learning course).
       http://www.oclc.org/institute/elearning/oll/CIRuMA/index.htm

3.   Online Audiovisual Catalogers, Cataloging Policy Committee. *Implementing the Revised AACR2 Chapter 9 for Cataloging Electronic Resources: An Online Training Presentation.*
       http://ublib.buffalo.edu/libraries/units/cts/olac/capc/ch9.ppt

4.   Online Audiovisual Catalogers, Cataloging Policy Committee. *Introduction to Cataloging Electronic Integrating Resources: An Online Training Presentation.*
       http://ublib.buffalo.edu/libraries/units/cts/olac/capc/ir.ppt

5.   Online Audiovisual Catalogers, Cataloging Policy Committee. *Source of Title Note for Internet Resources*.
       http://ublib.buffalo.edu/libraries/units/cts/olac/capc/stnir.html

6.   Program for Cooperative Cataloging, CONSER Program. *Transforming AACR2: Using the Revised Rules in Chapters 9 and 12.*
       http://lcweb.loc.gov/acq/conser/aacr2002/A2slides.html

C. Important Background Resources, No Longer Current:

1.   *Cataloging Internet Resources: A Manual and Practice Guide*. Second Edition. Nancy B. Olson, editor. Dublin, Ohio: OCLC, 1997.http://www.oclc.org/oclc/man/9256cat/toc.htm

2.   Hallam, Adele. *Cataloging Rules for the Description of Looseleaf Publications: with a Special Emphasis on Legal Materials*. Washington, D.C.: Office for Descriptive Cataloging Policy, Library of Congress, 1986.

D. Resources on Selecting and Providing Access to Internet Resources:

1.   AcqWeb: Library & Information Science Resources: Collection Development Sites: Selecting Web Resources:
       http://acqweb.library.vanderbilt.edu/acqweb/lis_cd.html

2. *Bibliography on Evaluating Internet Resources* by Nicole Auer, Virginia Tech University Libraries: http://www.lib.vt.edu/research/evaluate/evalbiblio.html

3. *The Catalog vs. The Homepage: Best Practices in Providing Access to Electronic Resources* by Georgia Briscoe, Cheryl Nyberg, and Karen Selden. Bibliography: http://lib.law.washington.edu/_cheryl/cathomebib.htm : http://lib.law.washington.edu/_cheryl/cathome.htm

4. Childress, Eric, with Erik Jul. "Perfect in So Many Ways." *Journal of Internet Cataloging* 5:2 (2002) 21-26.

5. Cornell University, *Evaluating Web Sites: Criteria and Tools*: http://www.library.cornell.edu/okuref/research/webeval.html

6. Librarians' Index to the Internet: *Selection Criteria for Adding Resources to the LII*: http://www.lii.org/search/file/pubcriteria

7. Library HQ.com: *Evaluating/Cataloging Internet Resources*: http://www.libraryhq.com/evaluate.html

8. WWW Virtual Library: *Evaluation of information Sources*: http://www.vuw.ac.nz/~agsmith/evaln/evaln.htm

9.

Evaluation Form

Your reactions to this workshop will help us in planning future programs. Thank you for your assistance.

Name/institution: (Optional) _____

Trainers:_____

Sponsor: _____

Place and date: _____

Please circle the words that most nearly reflect your response to the statement.

1.	The presenters were well organized and informative.	strongly disagree	disagree	neutral	agree	strongly agree
2.	The workshop content was relevant to my work.	strongly disagree	disagree	neutral	agree	strongly agree
3.	I gained useful information in the sessions.	strongly disagree	disagree	neutral	agree	strongly agree
4.	The exercises fit the material presented.	strongly disagree	disagree	neutral	agree	strongly agree
5.	I had ample opportunity to raise questions during the sessions.	strongly disagree	disagree	neutral	agree	strongly agree
6.	I had ample opportunity to raise questions during the exercises	strongly disagree	disagree	neutral	agree	strongly agree
7.	The overall workshop met my personal expectations.	strongly disagree	disagree	neutral	agree	strongly agree

8. Please tell us what you found to be most helpful in the workshop.

9. Were any topics not covered that you expected to be presented?

(Over)

10. How could we improve the content or other aspects of this workshop?

11. What topics would you like to see covered in future workshops?